Sona Systems, Ltd.

Experiment Management System

—

Master Documentation Set
20 April 2015

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About This Manual

This manual covers usage of the system from a variety of perspectives: Participant (Student), Researcher/Principal Investigator, Instructor, and Administrator. The manual is broken out into sections based on the type of user. In cases where the administrator has access to features also available to a researcher/PI, the functionality is documented in the Researcher/PI section of the documentation. Only administrator-specific features are covered in the Administrator section of the documentation.

As a user of the software, you are granted a right to copy this documentation, modify it, and distribute it within your organization. You may not distribute it outside of your organization without prior written permission from Sona Systems, Ltd.

You are encouraged to copy and modify this documentation to suit the needs of your organization. You will find this documentation covers every feature of the software, while you may have chosen to disable certain features in your implementation. Your users may prefer to read documentation that covers the system exactly as they will experience it, as opposed to this documentation, which may cover features that may not be enabled for them.

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PARTICIPANT (STUDENT) DOCUMENTATION

Introduction

The Experiment Management System provides an easy method for you to sign up for studies, and track your progress throughout the term. Everything is done through the software's web-based interface, so you can access the system at any time, from any computer, with a standard web browser.

It should be noted that this documentation covers all the features in the system, but your organization may have chosen to disable certain features. Do not be alarmed if the documentation covers options and features that are not visible on the system you are using.

Getting Started

Your interaction with the system will be minimal and hopefully as painless as possible. After you log in to the system, you can view a list of available studies and any restrictions, sign up for studies that interest you, and track your progress throughout the semester. The system will track when you receive credits for a study, so you can view this online as well.

The system works best if you use any popular web browser that is less than 2 years old, like Internet Explorer, Firefox, Safari, and Chrome. It will work with other web browsers, and with older versions of popular web browsers, however the layout may not be as clean. No functionality will be lost by using an older web browser. The software will work if you are using a screen reader or other assistive tools for those with disabilities.

This documentation assumes you have a basic knowledge of how to use the web. On this system, it is not necessary to use the Back button. You can always use the toolbar on the top of every screen to navigate anywhere on the site.

Requesting an Account

If you see a link on the front page of the site to request an account, then your organization has enabled the feature to allow you to request an account. Click the link, and you will be required to provide some very basic information. Depending on how your system is configured, you may receive an email notification immediately with your login information, or you may receive the notification only after the administrator has approved your account request. The email notification will include login instructions for the system. You will be assigned a default password, which you may be allowed to change after your first login. In many cases, you may also provide an alternate email address (after your first login) if you prefer to receive future notifications at another email address. The email will come from the administrator's email address (typically listed on the request account page), so be sure to configure your junk mail filters to allow email from that address.

Figure 1 - Requesting an Account

If your organization has not enabled this feature, then your organization will create an account on your behalf. You will receive this account information, most likely by email.

If you did not receive your login information, please check your email program's junk mail folder before contacting the administrator. The most common reason for not receiving login information is that an email program misclassified the email as junk mail.

Logging In

Once you have your login information, go to the front page of the site and enter your user ID and password to log in.

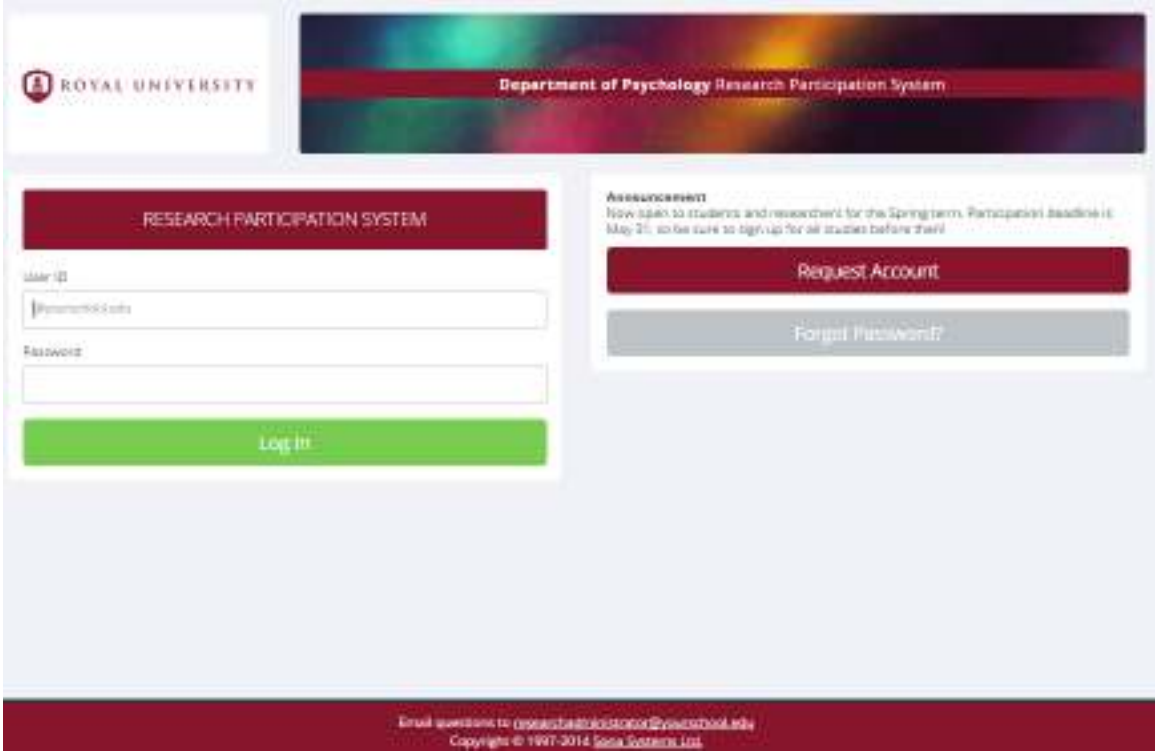


Figure 2 - Login Page

Once you log in, you may be asked to review and acknowledge your organization's human subject and privacy policy for research. You will need to acknowledge this only once every 6 months. You may also be asked to participate in a prescreening. After you complete these tasks, you will see the Main Menu.

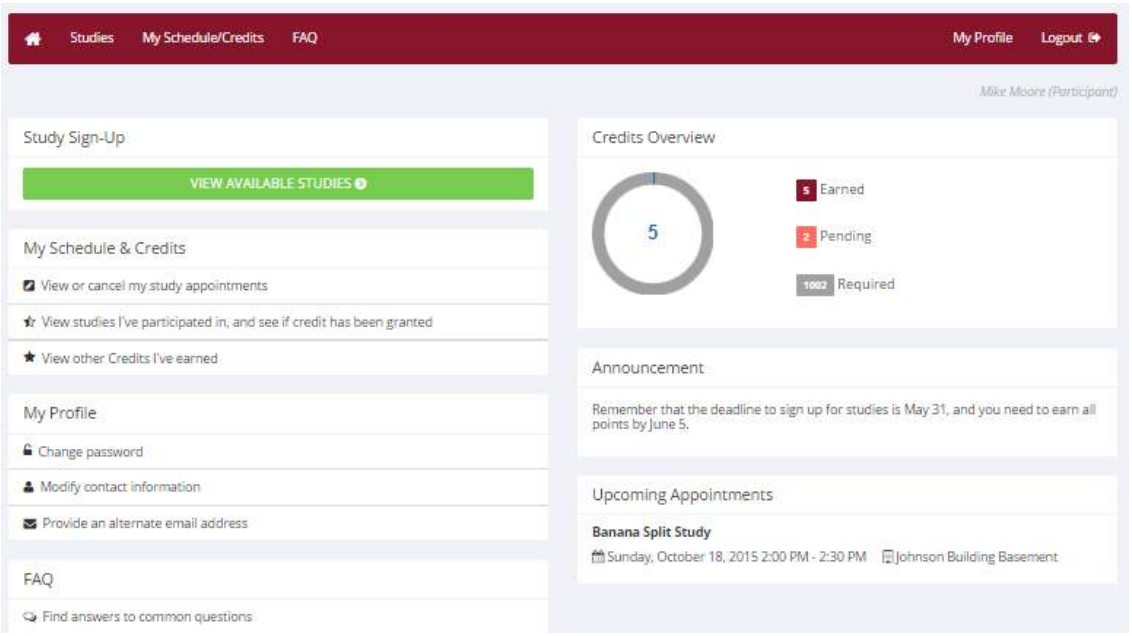


Figure 3 - Main Menu

Your login (also known as a session) will expire after a certain period of inactivity, usually 20 minutes, and the system will warn you a few minutes before the expiration. This is done for security purposes. If this happens, you can always log in again. When you are done using the system, it is better to explicitly log out, to prevent any problems that may arise if someone uses your computer before the session expires. This is especially important if you are using a public computer lab.

Retrieving a Lost Password

If you have forgotten or do not have your password, and the feature is enabled on the system, then you may choose to reset your password. You will see an option on the front login page if this feature is enabled. By choosing this option, a link to reset your password will be emailed to you shortly after you make the request. This link is valid for 24 hours, and if you click on it, a new password will be generated and emailed to you. If you provided an alternate email address (see the Email Address Options section of this documentation), it will be sent there. Otherwise, it will be sent to your main email address, which is derived from your user ID. If you requested a password reset and no email from the system has arrived after 30 minutes, then check in your email program's junk mail folder in case the email was delivered there. Typically, the email is sent within a few seconds of the request, but sometimes there can be a delay on behalf of some recipient email servers.

Logging Out

When you are done using the system, choose Logout from the top toolbar on the right side to log out. You are now logged out. It is always a good security measure to close all your browser windows as well, especially if you are using a computer that is shared by others.

Changing Your Password and Other Information

If you would like to change your password or other information about yourself, choose My Profile from the top toolbar. If you would like to change your password (and the option is enabled), type your new password (twice, for confirmation) in the provided boxes. If you would *not* like to change your password, simply leave these boxes empty.

If you change your password, please be sure to select a password you do not use on any other systems or websites, which is a good computing practice.

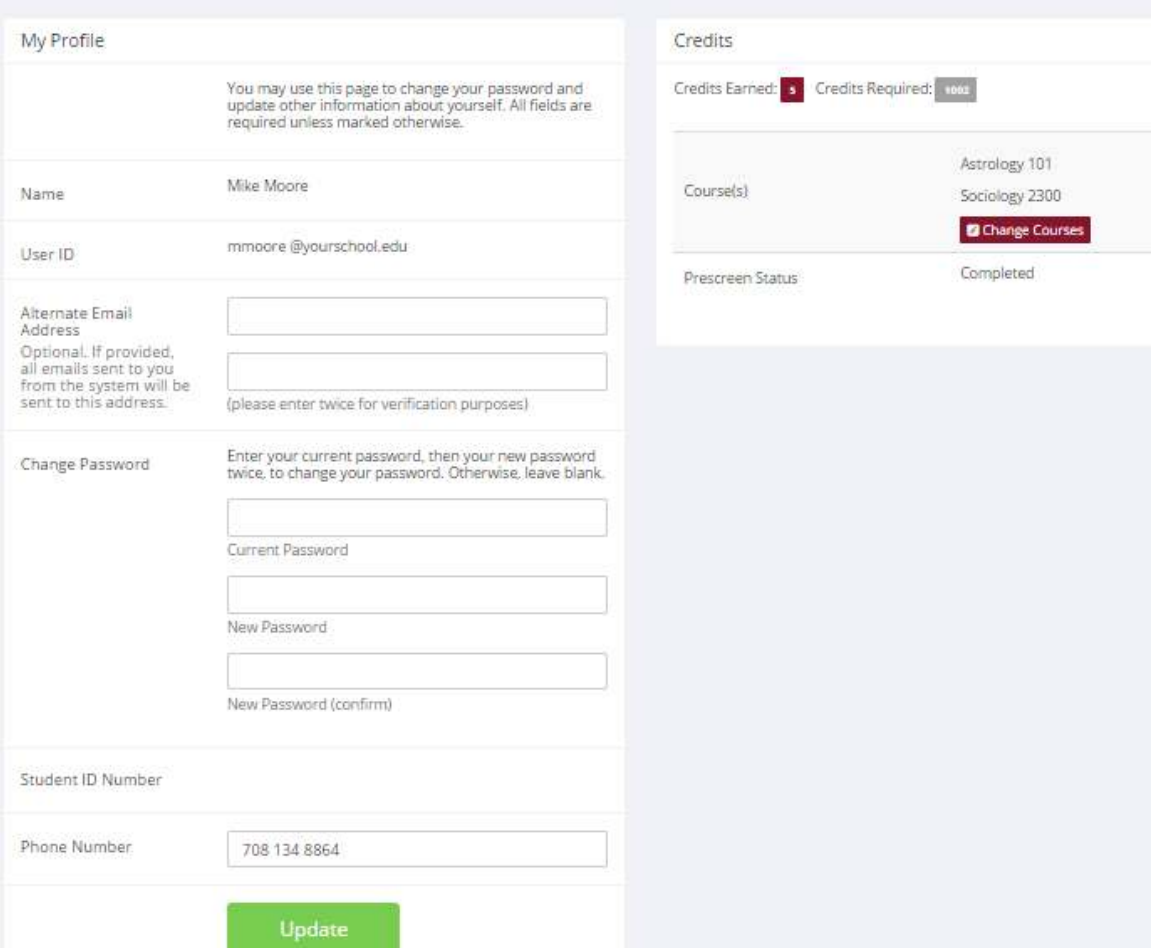


Figure 4 - Updating Your Profile

Email Address Options

There are certain events in the system which will cause an email notification to be sent to you. Most often, these are notifications that you have received credit for a study, or a confirmation that you have signed up for a study. If Unique ID codes are *not* enabled (see Unique ID codes), your email address is also displayed to the researcher when they view who has signed up for their study, in the event they need to contact you.

You may have two choices for your email address. When you update your profile, you will see a box where you may provide an alternate email address. If you provide such an address (this could be a Hotmail account, for instance), this is the address where any notifications will be sent, and this is also the address that will be displayed to researchers (if enabled).

If you do not supply an alternate email address, the system will derive your email address from your username. Typically, it will add your organization's Internet domain (if there is one) to the end of your user ID to form the address, so if your user ID is "jsmith" and your organization's Internet domain is "yourschool.edu" then it would derive your email address as "jsmith@yourschool.edu".

In situations where the system is configured so you may enter an email address on this page, you will be asked to enter it twice when changing the address, to ensure it is typed correctly.

In some cases, depending on how the system is configured, you will be required to provide an email address (which will be listed as “Email Address” instead of “Alternate Email Address”) and all emails to you will go to that address.

On some systems, the Alternate Email Address option is not available. In other cases, it is listed but you are not allowed to change it, in which case you should contact the administrator if you need this changed.

Changing Courses

Depending on how the system is configured, you may see an option to change which courses you are in. If this is an option, then you will see a “Change Courses” option just below the list of courses you are in.

You may have the option to remove yourself from existing courses and add yourself to new courses, or you may only have the option to add yourself to new courses. If you remove yourself from a course, and you had credits assigned to that course, the credits will *not* be reassigned to another course. You will receive a warning about this and be taken to a page where you can reassign those credits. You can go to My Schedule/Credits at any time to assign unassigned credits to a course.

Unique ID Codes

If enabled, the system will automatically assign a unique, numeric ID code to you. You should continue to use your normal login ID to log in to the system. The purpose of the ID code is to identify you to researchers in a way that does not reveal your identity or compromise your privacy. If this feature is enabled, you will see this ID code when you go to view your profile, and in email confirmations and reminders about your upcoming study sessions. You should bring this ID code with you when you go to studies or when communicating with researchers, as they know you only by your ID code, and not your name.

Studies

With the system, you may view studies and sign up for those that interest you and where you meet any special eligibility restrictions. You may cancel your sign-up through the system as well.

You may see some studies that are online studies. You should read the details of these studies closely, but generally you may participate in them online without having to go to a lab. It is usually assumed you will participate in the study shortly after you sign up for it, though you have until the Participation Deadline Date to participate.

Viewing Studies

To view a list of studies, click on Studies from top toolbar. You will see a list of studies. A brief description of each study will be listed, as well as any special requirements that may restrict your eligibility to participate in the study.

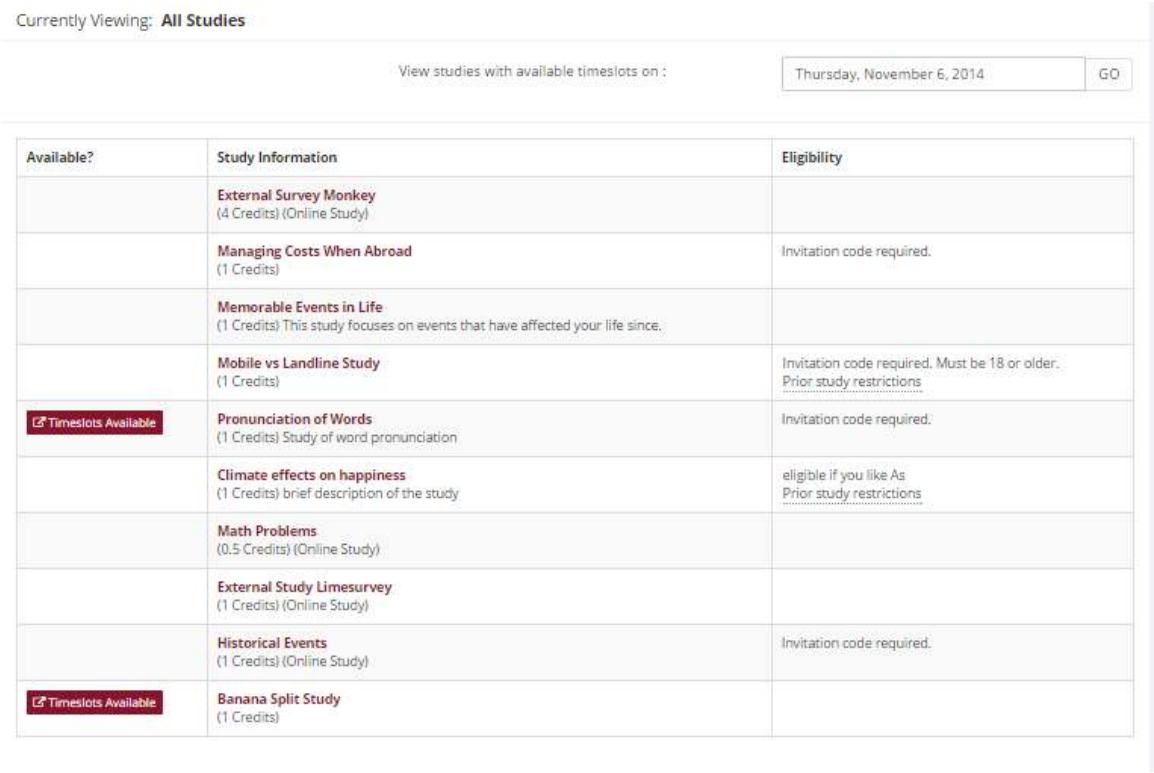


Figure 5 - Viewing Studies

Studies that currently have available participation times (timeslots) will have “TIMESLOTS AVAILABLE” listed next to the name of the study. If no studies have available timeslots, you may want to log on to the system a few days later to see if new timeslots have been added. You may also select a specific date to view studies with available timeslots on that date.

To view more information about a study, click on the name of the study.

Two-Part Studies

Some studies are two-part studies, where you must sign up for both parts of the study at once, and the two parts must be scheduled a certain number of days apart. These studies will be clearly marked, and the system will ensure you are only able to sign up for timeslots with the appropriate amount of time between the first and second part.

Online Survey Studies

Some studies may be online survey studies that are administered in the system. If you sign up for one of these studies, you will be taken immediately to the survey. As soon as you complete the survey, you will receive credit.

You may withdraw from the survey at any time, by clicking the Withdraw button on the top right corner of the screen. When you withdraw, you have an option to withdraw without the chance to receive credit, or with the chance to receive credit. The difference is that if you withdraw without the chance to receive credit, then your sign-up will be completely deleted from the system. This is useful if you simply changed your mind about participating in the survey, but might like to participate in it again at a later time.

If you choose to withdraw with the option to receive credit, then your sign-up will be logged and the researcher will be notified of the withdrawal, but you will not be granted credit immediately. The researcher may then choose to grant credit to you for your participation in the study. If this is done, you will not have the opportunity to participate in this study again (because you may not participate or receive credit for the same online survey study more than once). With this withdrawal option, you are not obligated to provide any explanation of why you are choosing to withdraw, but you may provide an explanation if you like, and this information will be sent to the researcher when they are notified of your withdrawal.

With either withdrawal option, all the survey responses you provided are permanently deleted at the time you withdraw.

Signing Up For Studies

To sign up to participate in a study, find the study you would like to participate in (see Viewing Studies in this documentation). Click on the study name for more information. You will see a list of any special restrictions or eligibility requirements, as well as a contact person if you have questions about the study. If the study has a principal investigator listed, you can click their name to view full contact details. In most cases, it is preferred that you contact the person listed as the researcher if you have specific questions.

Some restrictions are automatically enforced by the system. If the study has certain pre-requisites or disqualifiers (studies you must *not* have participated in to participate in this study), those may be listed, as well as a note about whether you meet those eligibility requirements. If you have signed up for a study with another study listed as a disqualifier study, then you will be prevented from signing up for the other study, since it is a disqualifier for a study you are currently signed up for.

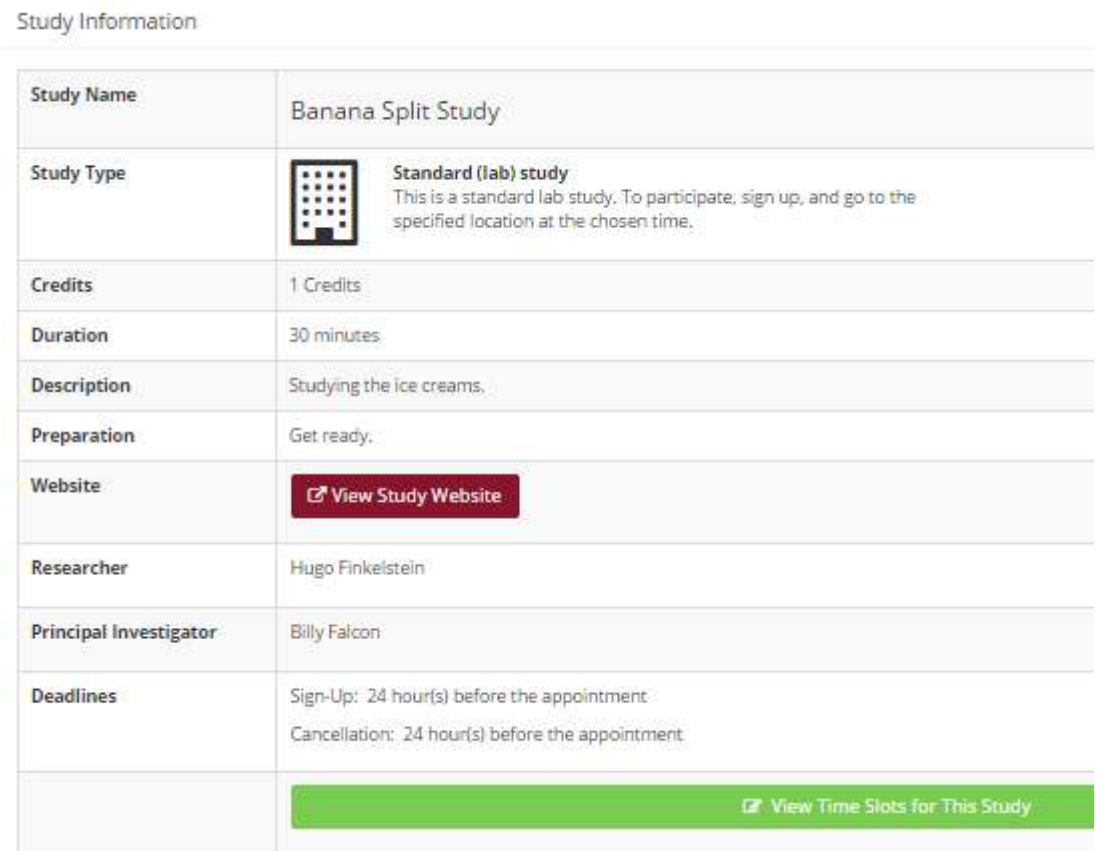


Figure 6 - Study Information

The study may have other restrictions listed as Eligibility Requirements. An example of an eligibility requirement is "Left-handed people only." If listed, then the system does *not* enforce this restriction, but you should only sign up for the study if you meet this restriction. If you sign up for the study and you do not meet the restrictions, you will likely not receive credit for the study, and could face a penalty.

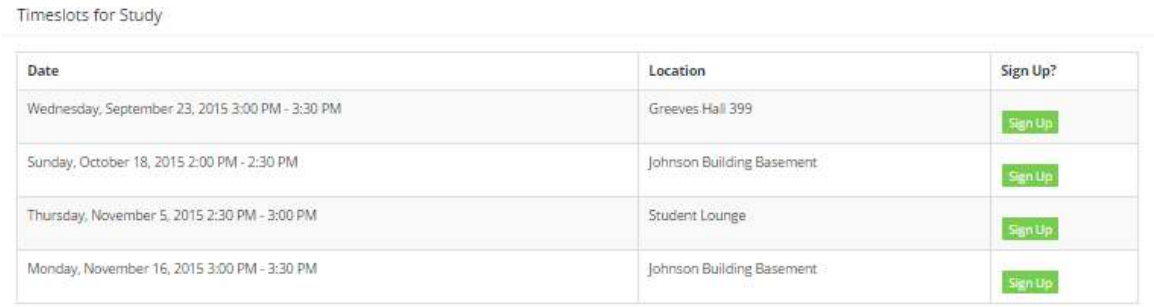
If the study is not an online study, then the sign-up and cancellation deadlines for the study will be listed, and those are based on the date of each timeslot.

If you are viewing a study which you have signed up for in the past and already participated, and are not allowed to sign up for it again, then you will not see the list of timeslots for the study.

Some studies require a special password (known as an Invitation Code) to sign up. If this is the case, it will be noted. The researcher should have given you this invitation code. It is *not* the same as the password you use to log in to the system. You will need to enter the invitation code just before you click the Sign Up button to sign up for a timeslot.

You may only sign up for a timeslot up until a certain time before that timeslot is scheduled to occur. The system will not show a Sign Up button for timeslots where it is too late to sign up. If you sign up for

a timeslot and you already have another signup in the system that conflicts with that appointment time, the system will warn you of the scheduling conflict (though it will not prevent the sign-up).


Timeslots for Study

Date	Location	Sign Up?
Wednesday, September 23, 2015 3:00 PM - 3:30 PM	Greeves Hall 399	Sign Up
Sunday, October 18, 2015 2:00 PM - 2:30 PM	Johnson Building Basement	Sign Up
Thursday, November 5, 2015 2:30 PM - 3:00 PM	Student Lounge	Sign Up
Monday, November 16, 2015 3:00 PM - 3:30 PM	Johnson Building Basement	Sign Up

Figure 7 - Study Timeslots

Once you have determined you meet all the requirements, click on View Timeslots for This Study and you will see a list of available timeslots. Choose a timeslot that is convenient for you, and click Sign Up.

After you click Sign Up, you will see information displayed confirming the time and location of the study you plan to participate in. You may receive an email confirmation as well, depending on how your system is configured. You are now signed up for the study. To cancel your sign-up, see Canceling a Sign-Up in this documentation.

Canceling a Sign-Up

If you need to cancel a timeslot you have signed up for, you can do this from the My Schedule and Credits page. Choose the My Schedule/Credits option from top toolbar.

You will see listed all the studies you have signed up for, as well as those you have completed (see the Tracking Your Progress section of this documentation for more information).

Studies you have signed up for that you are allowed to cancel will have a Cancel button next to them. There is a time limit before the study is to occur, when it is too late to cancel. This restriction may be listed at the bottom of the page, or can be found by clicking on the study name and viewing the study details, depending on how cancellation deadlines are configured in your system.

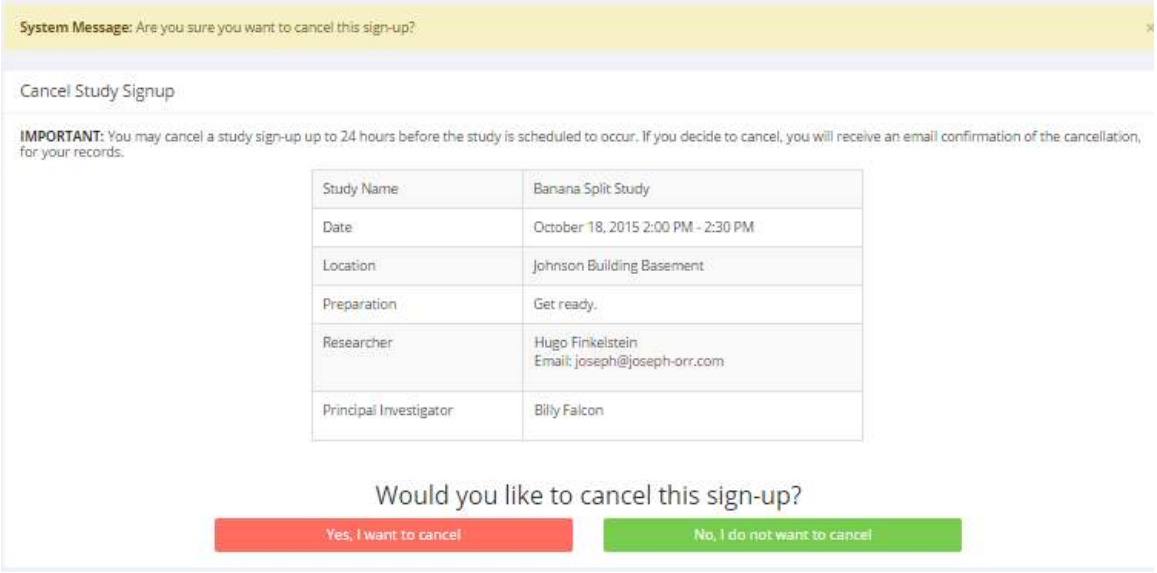

System Message: Are you sure you want to cancel this sign-up?
Cancel Study Signup
IMPORTANT: You may cancel a study sign-up up to 24 hours before the study is scheduled to occur. If you decide to cancel, you will receive an email confirmation of the cancellation, for your records.
Study Name
Banana Split Study
Date
October 18, 2015 2:00 PM - 2:30 PM
Location
Johnson Building Basement
Preparation
Get ready.
Researcher
Hugo Finkelstein
Email: joseph@joseph-orr.com
Principal Investigator
Billy Falcon
Would you like to cancel this sign-up?
Yes, I want to cancel
No, I do not want to cancel

Figure 8 - Sign-Up Cancellation

Once you click Cancel to cancel your sign-up, you will see a confirmation page. You will also be warned if your cancellation might affect your ability to participate in other studies you have signed up for, due to pre-requisite restrictions. If the cancellation will affect your ability to participate in another study you are signed up for, it is *your* responsibility to deal with this issue (usually by canceling the dependent study as well). The system will warn you, but will not block the cancellation.

Click Yes to cancel your sign-up, and the sign-up will be cancelled immediately.

If you cancel the first part of a two-part study, the second part will also be cancelled. If you cancel the second part of a two-part study, the first part will *not* be cancelled, but you will need to ask the researcher to sign you up for the second part again, if you would like to participate in it at a later date.

Tracking Your Progress

You may track your progress at any time by choosing the My Schedule/Credits option from the top toolbar.

When you view this page, you will see at the top a list of the number of credits you are expected to earn, and how many you have earned so far. You may also have an option to view how many credits you have earned for each course. Below that, if you have signed up for any studies, those are listed as well. In the list of studies, you will see information about your credit status.

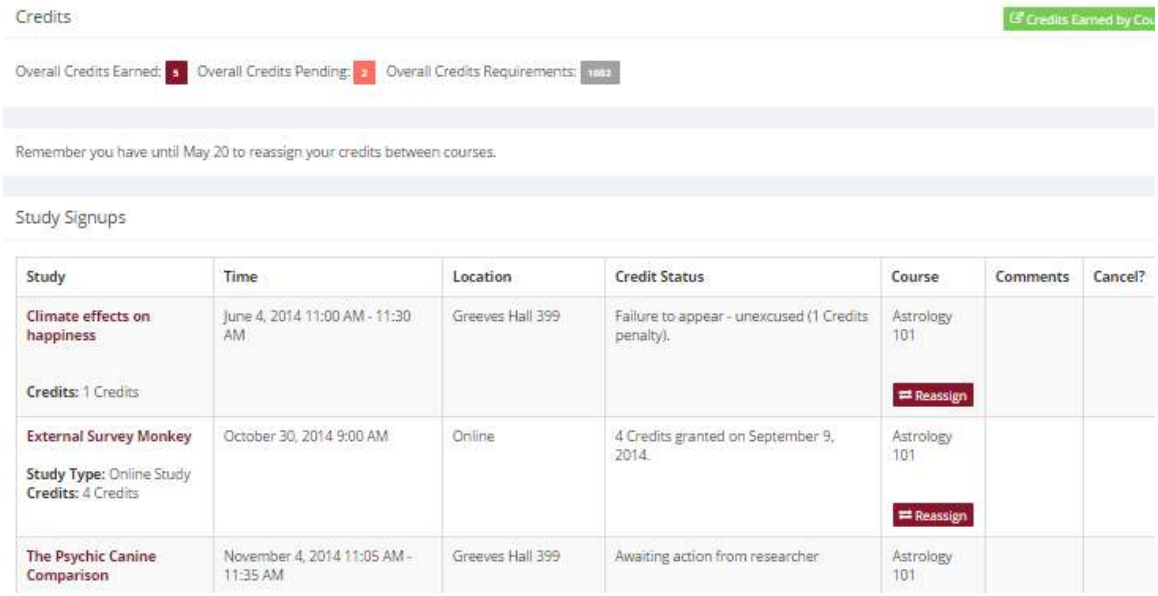


Figure 9 - Viewing Your Progress

If you failed to appear for a study, it is possible you were assessed a penalty. That will be displayed in your progress, and the penalty (if assessed) will either increase the number of credits you must earn, or be deducted from your current credit earnings, depending on how the system is configured. It is possible you might end up with a negative value for the number of credits you have earned. Next to each signup, you can also see any comments the researcher left regarding the study and your credit for it. In cases where the study was set up for monetary compensation and not credits, your participation will be noted as "participated." This is done to ensure your eligibility for any studies where the study you just completed is a pre-requisite study.

Non-study credit is also listed, when applicable. Non-study credit is usually granted for writing a paper, completing the prescreen, or some other special situation.

It is possible that older records of your participation are in the system, but not displayed. If that is the case, you'll see an option to view your older signups as well.

Reassigning Credits

If you belong to multiple courses, and the system is configured to allow it, you may reassign a credit from one course to another. To do this, simply use the Reassign link that appears when you view your progress. The link appears under the course entry for each item in your progress listing. You may not split a credit between two courses, for example by assigning 2 credits of a 3-credit study to one course, and 1 credit from that study to another course.

Online Prescreening

If enabled on your system, you may be asked to take an online prescreen before you use the system. Depending on how the prescreen is configured, you may have the option to opt out of the entire

prescreen and/or individual questions. You should realize that declining to participate in the prescreen or certain questions may affect your eligibility for some studies, so participation is encouraged.

In some cases, you may earn credit for participating in the prescreen, and you may even earn credit if you decline to participate in the prescreen. If either case holds true, the system will inform you of this before you commence the prescreen.

The prescreen may consist of multiple sections. All questions are either multiple-choice or fill-in (free-entry) answer. At the end of the prescreen, you may have a chance to review and change any of your responses. After you save all your responses, you may not participate in the prescreen again (unless the administrator has allowed this or deleted your existing responses), so answer the prescreen carefully.

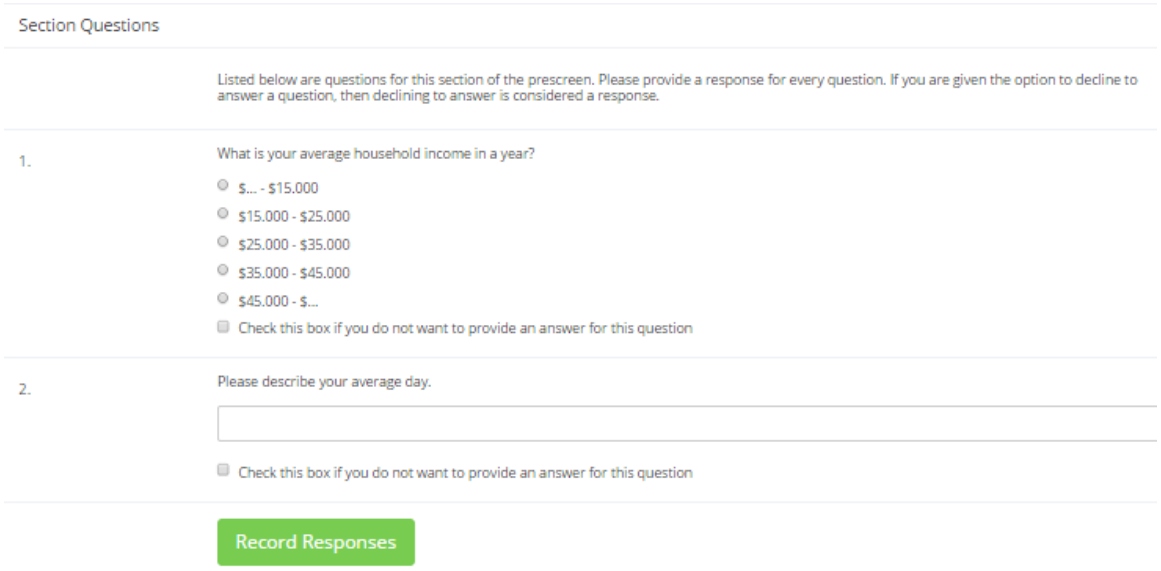

Section Questions
Listed below are questions for this section of the prescreen. Please provide a response for every question. If you are given the option to decline to answer a question, then declining to answer is considered a response.
1.
What is your average household income in a year?
$... - $15.000
$15.000 - $25.000
$25.000 - $35.000
$35.000 - $45.000
$45.000 - $...
Check this box if you do not want to provide an answer for this question
2.
Please describe your average day.
Check this box if you do not want to provide an answer for this question
Record Responses

Figure 10 - Prescreen Questions

Frequently Asked Questions

Immediately after I login, as soon as I click on any menu option, I am taken back to the login page and I see a message that my authentication has expired. What does this mean?

Your web browser is not properly configured to accept cookies. You should turn on cookies in your web browser, use a different web browser (for example, try Firefox if you are currently using Internet Explorer), or try a different computer. Detailed instructions can be found if you go to the site and enter the url “cookie_help.aspx” in place of “default.aspx” in the address bar of the browser, when you are on the front page of the site.

Another easy thing to try is simply to use another computer. Usually the computers in university computer labs are configured correctly.

I participated in a study, but I have yet to receive credit. How do I receive credit?

The researcher must grant you credit. This is usually done shortly after your participation. If it has been some time and you have still not received credit, contact the researcher.

Who can see the information about my sign-ups? I don't want everyone to know which studies I signed up for.

Only the researcher and principal investigator of the study may see that you have signed up for it, along with the site administrator. No other users, including other researchers or your instructor, may see this information.

How do I change the email address where email notifications from the system are sent?

Provide an Alternate Email address and notifications will be sent there. See the Email Address Options section of this documentation for more information. In some cases, this option may not be available.

I wrote a paper instead of participating in studies. How do I know I have completed my requirements?

View the My Schedule and Credits page and any non-study credit will also be listed there. See the Tracking Your Progress section of this documentation for more information.

I noticed that with some studies, I can sign up for them again even if I participated before, while others don't allow for this. Why is this?

Researchers can choose if their studies allow you to participate more than once. Not all studies allow you to participate more than once.

I attempted to sign up for a study, and I was prevented from doing so because the study I was trying to sign up for is a disqualifier for another study I am scheduled to participate in. Why is this?

If you have signed up for a study that has disqualifiers (studies you must *not* have participated in to participate in that study), you may not then sign up for the studies that are listed as the disqualifier studies. You *are* allowed to sign up for the disqualifier studies if the disqualifier study will take place after the study with disqualifiers, or if you have already participated in (and received credit for) the study with disqualifiers. The easiest way to sign up for both studies is to schedule the disqualifier study at a time later than the study with disqualifiers.

RESEARCHER/P.I. DOCUMENTATION

Introduction

The Experiment Management System is used for the scheduling and management of research participants and the studies they participate in. Participants, researchers, principal investigators, and instructors all use the system for their respective purposes. As a researcher, you can set up your studies in the system, schedule the sessions (timeslots) when participants may participate, and grant or revoke credit after the session. All of this is handled through a simple web-based interface that you can access at any time, from any popular web browser.

The system is highly configurable by the administrator, to enforce the rules for the research participant pool exactly as your organization desires. It should be noted that the documentation herein may refer to features that are not enabled on your system. Contact your local administrator, whose contact information appears at the bottom of every page on the system, for more information.

System Basics

In the system, you create studies. Each study may have a number of timeslots, which are the times when you plan to run the study. Participants sign up for the timeslots by viewing a list of studies and available timeslots. You grant or revoke credit to participants after the session occurs.

Principal Investigator Special Note

This documentation applies to both researchers and principal investigators (P.I.s), when P.I. support is enabled by the administrator. A P.I. can perform all the same functions on a study as a researcher. This allows a P.I. to operate in an oversight role and monitor the progress of their studies, and step in on behalf of the researcher when necessary. Because the privileges are the same, throughout this documentation, the term “researcher” can be used interchangeably with “principal investigator” except where otherwise noted. If the P.I. feature is enabled, then all studies must have a P.I. specified. The main difference between a P.I. and researcher account is that researchers have the option to receive routine emails from the system about their study, like a notification any time a participant signs up or cancels, while the P.I. has no such option.

Participant ID Codes Special Note

If enabled by the administrator, the system will identify participants to you only by a unique, system-assigned ID code, and not by their name or email address, for privacy reasons. Participants are made aware of this, and they are reminded to bring this code along with them when participating in studies, since the researcher will not know them by their name.

Getting Started

The system works best if you use any popular web browser that is less than 2 years old, like Internet Explorer, Firefox, Chrome, and Safari. It will work with other web browsers, and with older versions of popular web browsers, however the layout may not be as clean. No functionality will be lost by using an older web browser.

Ask your system administrator if you need help with installing or using a web browser. This documentation assumes you have a basic knowledge of how to use the web. On this system, it is not necessary to use the Back button. You can always use the toolbar on the top to navigate to anywhere on the site.

Logging In

Your administrator will provide you with a username and password to login to the site, as well as the URL (web address). When you go to the front page of the site (the login page), you may see a link to request an account. This form is *only* for participants. Do not use this form to request an account, as participant accounts have an entirely different set of privileges, and the privileges are not appropriate for a researcher.

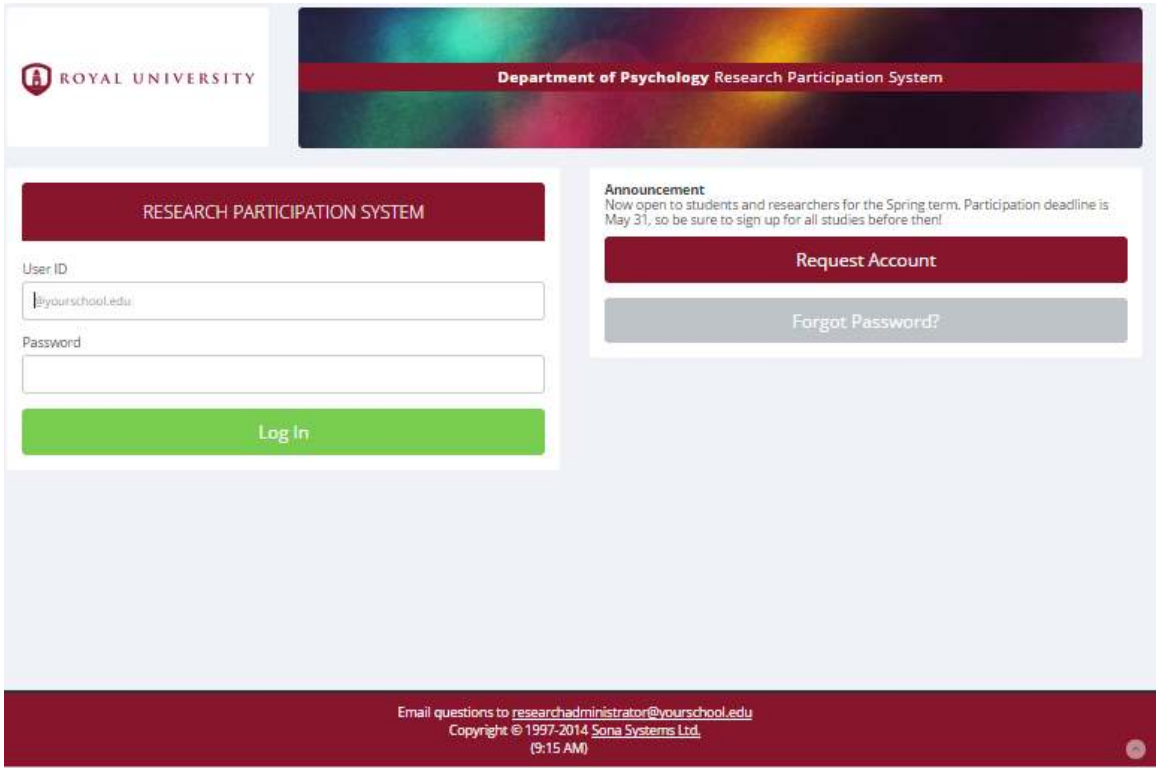

ROYAL UNIVERSITY
Department of Psychology Research Participation System
RESEARCH PARTICIPATION SYSTEM
User ID
@yourschool.edu
Password
Log In
Announcement
Now open to students and researchers for the Spring term. Participation deadline is May 31, so be sure to sign up for all studies before then!
Request Account
Forgot Password?
Email questions to researchadministrator@yourschool.edu
Copyright © 1997-2014 Sona Systems Ltd.
(9:15 AM)

Figure 11 - Login Page

Once you log in, you may be asked to review and acknowledge your organization's human subject policy. If required by the administrator, you will need to acknowledge this once every 6 months. You will see the Main Menu after you acknowledge the policy.

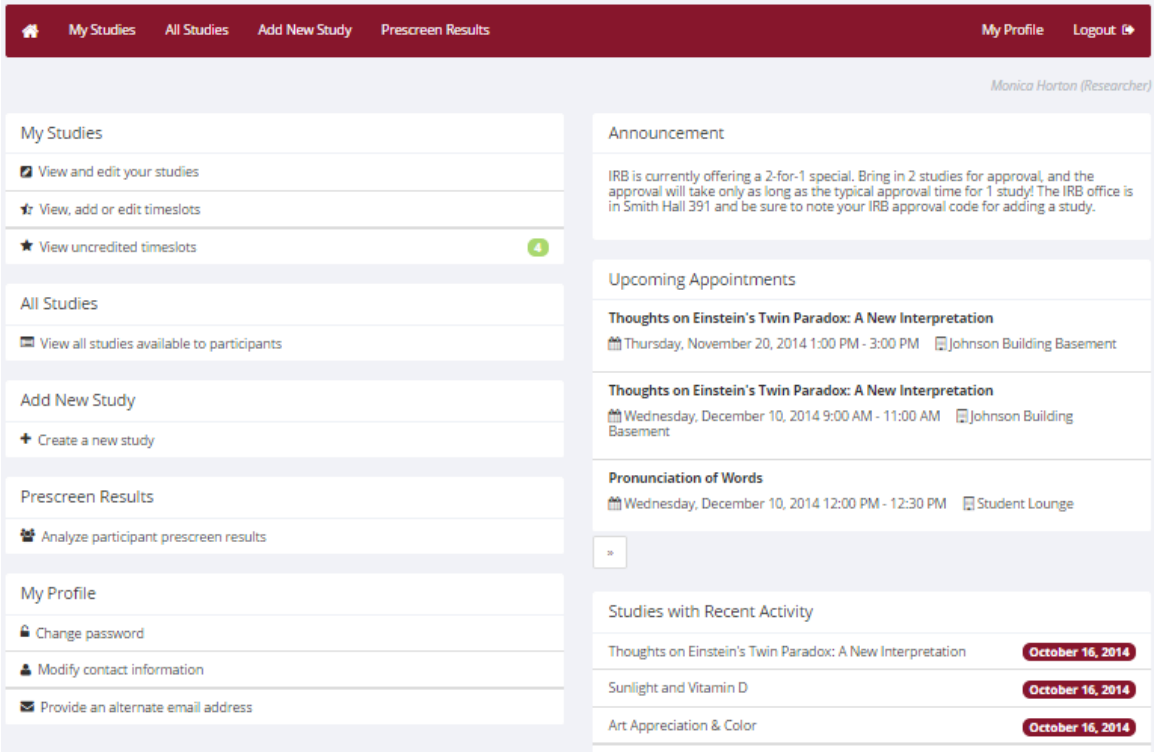

My Studies
All Studies
Add New Study
Prescreen Results
My Profile
Logout
Monica Horton (Researcher)
My Studies
View and edit your studies
View, add or edit timeslots
View uncredited timeslots
4
All Studies
View all studies available to participants
Add New Study
Create a new study
Prescreen Results
Analyze participant prescreen results
My Profile
Change password
Modify contact information
Provide an alternate email address
Announcement
IRB is currently offering a 2-for-1 special. Bring in 2 studies for approval, and the approval will take only as long as the typical approval time for 1 study! The IRB office is in Smith Hall 391 and be sure to note your IRB approval code for adding a study.
Upcoming Appointments
Thoughts on Einstein's Twin Paradox: A New Interpretation
Thursday, November 20, 2014 1:00 PM - 3:00 PM Johnson Building Basement
Thoughts on Einstein's Twin Paradox: A New Interpretation
Wednesday, December 10, 2014 9:00 AM - 11:00 AM Johnson Building Basement
Pronunciation of Words
Wednesday, December 10, 2014 12:00 PM - 12:30 PM Student Lounge
»
Studies with Recent Activity
Thoughts on Einstein's Twin Paradox: A New Interpretation
October 16, 2014
Sunlight and Vitamin D
October 16, 2014
Art Appreciation & Color
October 16, 2014

Figure 12 - Main Menu

Your login (also known as a session) will expire after a certain period of inactivity, usually 20 minutes, and you will be warned a few minutes before this expiration. This is done for security purposes. If this happens, you can always log in again. When you are done using the system, it is better to explicitly log out, to prevent any problems that may arise if someone uses your computer before the session expires.

Retrieving a Lost Password

If you have forgotten or do not have your password, and the feature is enabled on the system, then you may choose to reset your password. You will see an option on the front login page if this feature is enabled. By choosing this option, a link to reset your password will be emailed to you shortly after you make the request. This link is valid for 24 hours, and if you click on it, a new password will be generated and emailed to you. If you provided an alternate email address (see the Email Address Options section of this documentation), it will be sent there. Otherwise, it will be sent to your main email address, which is derived from your user ID. If you requested a password reset and no email from the system has arrived after 30 minutes, then check in your email program's junk mail folder in case the email was delivered there. Typically, the email is sent within a few seconds of the request, but sometimes there can be a delay on behalf of some recipient email servers.

Logging Out

When you are done using the system, choose Logout from the top toolbar to log out. You are now logged out. It is always a good security practice to close all your web browser windows as well, especially if you are using a computer that is shared by others.

Changing Your Password and Other Information

If you would like to change your password or other information about yourself, choose My Profile from the top toolbar. If you would like to change your password, type your new password (twice, for confirmation) in the provided boxes. If you would *not* like to change your password, simply leave these boxes empty.

If you change your password, please be sure to select a password you do not use on any other systems or websites, which is a good computing practice.

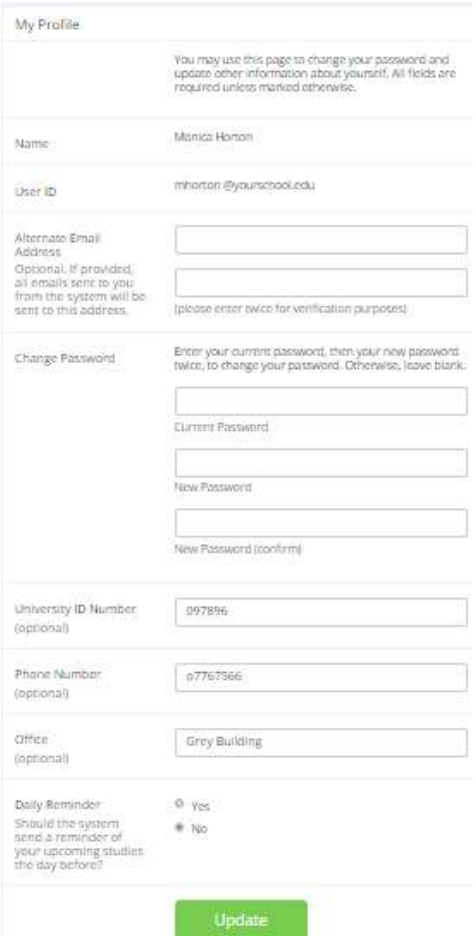

My Profile
You may use this page to change your password and update other information about yourself. All fields are required unless marked otherwise.
Name
Monica Horton
User ID
mhorton @yourschool.edu
Alternate Email Address
Optional. If provided, all emails sent to you from the system will be sent to this address.
(please enter twice for verification purposes)
Change Password
Enter your current password, then your new password twice, to change your password. Otherwise, leave blank.
Current Password
New Password
New Password (confirm)
University ID Number (optional)
097896
Phone Number (optional)
07767566
Office (optional)
Grey Building
Daily Reminder
Should the system send a reminder of your upcoming studies the day before?
Yes
No
Update

Figure 13 - Updating Your Profile

It is recommended you provide your phone number and office location, as this information will be made available to research participants who sign up for your studies. If you are a researcher, this contact information will be displayed to participants when they view information about the study. If you are a principal investigator, this contact information will be displayed if a participant explicitly chooses to view it (since the researcher is the primary point of contact for a study).

Researchers (but not PIs) may also choose to receive a daily reminder (by email) with information about all of their study sessions scheduled for the following day.

Email Address Options

There are certain events in the system, which will cause an email notification to be sent to you. Most often, these are notifications that a participant has signed up or cancelled their sign-up for your studies, but there are a few other cases where it may be used as well. The email address is also displayed to the participant when they view information about the study, in case they need to contact you with questions.

You have two choices for your email address. When you update your personal information, you will see a box where you may provide an alternate email address. If you provide such an address (this could be a Gmail account, for instance), this is the address where any notifications will be sent, and this is also the address that will be displayed to other users (including participants in your studies).

If you do not supply an alternate email address, the system will derive your email address from your username. Typically, it will add your organization's Internet domain to the end of your user ID to form the address, so if your user ID is "jsmith" and your organization's Internet domain is "yourschool.edu" then it would derive your email address as "jsmith@yourschool.edu".

In situations where the system is configured so you may enter an email address on this page, you will be asked to enter it twice when changing the address, to ensure it is typed correctly.

In some cases, depending on how the system is configured, you will be required to provide an email address (which will be listed as "Email Address" instead of "Alternate Email Address") and all emails to you will go to that address.

Working with Studies

Most of your time on the system will be spent, not surprisingly, using the study-related features of the system. Be sure to read this section closely, in its entirety, as there are special features and situations you should be aware of.

Web-Based (Online) Studies

If enabled, you may set up studies that are web-based (online), and these studies may be set up internally in the system (online survey study) or outside the system (online external study). The options will vary depending on how your system is configured.

There are a few things to note about web-based studies:

- Once you indicate to the system that the study is web-based, you will not be able to change it so that it is no longer web-based (but you can deactivate or delete the study). So, make this choice carefully
- Web-based studies are typically set up so there is one timeslot, and that timeslot contains the maximum number of participants you would like to participate, and the *last* date and time when they can participate (often, this is the end of the term). It is not recommended that you set up multiple timeslots for a web-based studies (it confuses participants), though the system

will support it. It is acceptable to have multiple timeslots where more than one is not active at a time. For example, one could have had a deadline date of the end of the previous semester (and thus is currently in the past), while the current timeslot has a deadline date of the end of the current semester (i.e., in the future).

- It is generally assumed that participants will participate in an online study shortly after they sign up. Because of this, the system will expect you to grant credit to them soon after they sign up. If you are creating an online survey within the system, credit will be granted automatically, immediately after the participant completes the survey.
- In the case of an external web study, if you are using a survey product like Qualtrics, SurveyMonkey, LimeSurvey, SurveyGizmo, etc., then you may be able to set up credit granting so it occurs automatically as soon as the participant completes the study. See External Study Credit Granting for more information.

Throughout the sign-up process, participants are notified that the study is online.

If the study is not administered by the system (online external study), then participants are not given the URL for the study website until they have signed up, to ensure they complete a sign-up in the system for the study. They can see the URL after sign-up, and while the timeslot they signed up for is still in the future. Once the timeslot they have signed up for is in the past, they no longer have access to the study URL. There is also an option when setting up the study so that the URL will no longer be available as soon as the participant is marked as having participated in the study (regardless of the timeslot date). This restriction regarding viewing the study URL applies only to participants, and only to web-based studies administered outside the system. Online external studies are discussed in more detail in the section Online External Studies, later in this document.

Online survey studies (surveys administered by the system) are discussed in great detail in the section Online Survey Studies, later in this document. Please read it carefully before setting up an online survey study.

Studies for Pay

In cases where participants are compensated for their participation in the study, you may set it up as a paid study and specify the compensation amount. The payment field is text, so you do not need to type in an exact amount, but can type in anything like “Amazon Gift Card” or even indicate a variable payment based on performance.

If participants are compensated *and* they receive credit, you should set it up as a credit study and indicate additional compensation in the study’s information section.

Regardless of the type of study, after a participant participates in a study (including studies that are for pay only), you should still go into the system and indicate their participation by noting their participation or no-show when viewing their sign-up This allows the system to properly enforce certain restrictions on the participant and their studies, like pre-requisite and disqualifier study restrictions. It also ensures a proper record is kept in the system of their participation.

Two-Part Studies

You may create a two-part lab study in the system. Often, these are studies involving memory research, where the participant must return a specified number of days after the first session. When creating a study, you may specify the day range for the second part of the study (e.g. 7 to 10 days after the first part). Participants are required to sign up for both sessions at the same time, to reduce the chance they will forget to sign up for the second part. Each part of a two-part study may have a different credit value and duration, but each part must be the same type – either both parts are for credit or both parts are for compensation. Online studies may not be two-part studies because there is no concept of making an appointment to take an online study at a specific date and time. If one part of the study is an online study, simply create two separate studies (one for each part) and set the first study as a pre-requisite for the second study.

With two-part studies, you may specify that the second part of the study must be scheduled to take place at exactly the same time as the first part (on a different date), or at any time on the dates that are the specified number of days after the first part.

You should ensure there are enough available timeslots for both parts of the study, or participants will be prevented from signing up for either part. Participants may cancel either part of their sign-up if necessary. If they cancel the first part, the second part is automatically cancelled as well. If they cancel only the second part and the first part has already occurred, and they would like to participate in the second part later, you will need to manually sign them up for the second part (if you are allowed to do so), or ask the administrator to handle this.

If you grant a no-show for the first part of a two-part study, the second part of that participant's sign-up will *not* be cancelled automatically, but you will be reminded of the situation in case you would like to cancel the second part. The cancellation is not automatic as there are some situations where automatic cancellation is not desirable.

Two-Part Study Configuration Scenarios

Listed below are some common scenarios, and how to configure them in the system:

Scenario	**Configuration**
Second part to take place a week later, at any time during that day.	Scheduling Range: 7 and 7 Scheduling Leniency: No
Second part to take place three days later, at exactly same the same time as part 1.	Scheduling Range: 3 and 3 Scheduling Leniency: Yes
Second part to take place one to two weeks later, at any time during the day.	Scheduling Range: 7 and 14 Scheduling Leniency: No
Second part to take place later on the same day as the first part.	Scheduling Range: 0 and 0 Scheduling Leniency: No

The system will enforce the configuration for the second part in terms of ensuring participants only sign up for timeslots that meet the two-part study restrictions. As the researcher, you also have additional control as you decide which timeslots to create for each part of the study. You should be careful to ensure that there are sufficient timeslots for each part. For example, if the study is set up so part 2 must occur exactly one day after part 1, and you have set up part 1 timeslots on Monday, then ensure you have some part 2 timeslots set up on Tuesday or participants will have trouble signing up for the Monday part 1 timeslots because there is no corresponding part 2 timeslot to sign up for.

Adding a Study

Some researchers choose to set up their studies in the system before they have received the proper approvals (usually from their IRB) to run the study. This is supported in the system. You can set up a study but specify that is it not visible to participants (this is the Approved setting). That way, as soon as your approval is received, you can simply make the study visible and everything else is already prepared. You can also post a study and make it visible immediately, if that is appropriate. Some systems will be configured in such a manner that only the administrator can approve the study, in which case you will need to contact the administrator to do so.

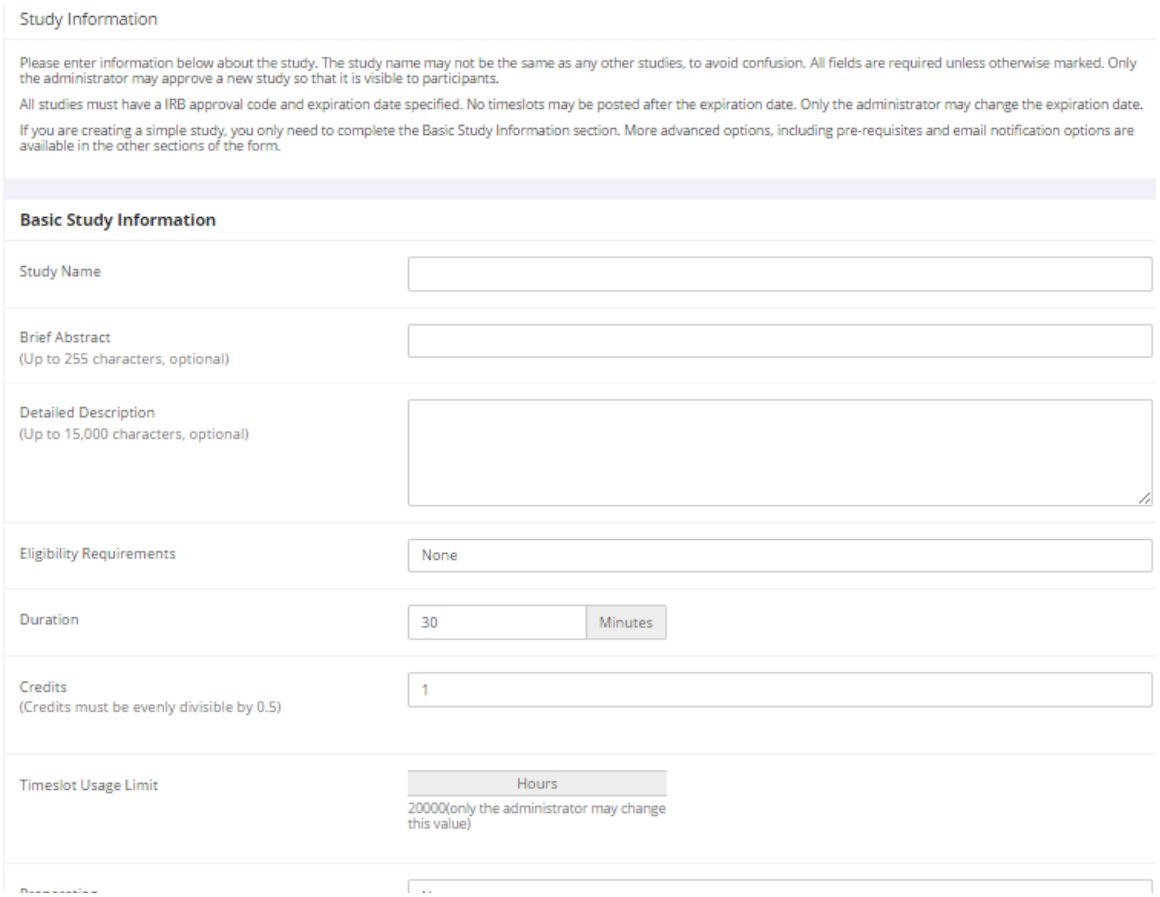

Study Information
Please enter information below about the study. The study name may not be the same as any other studies, to avoid confusion. All fields are required unless otherwise marked. Only the administrator may approve a new study so that it is visible to participants.
All studies must have a IRB approval code and expiration date specified. No timeslots may be posted after the expiration date. Only the administrator may change the expiration date.
If you are creating a simple study, you only need to complete the Basic Study Information section. More advanced options, including pre-requisites and email notification options are available in the other sections of the form.
Basic Study Information
Study Name
Brief Abstract
(Up to 255 characters, optional)
Detailed Description
(Up to 15,000 characters, optional)
Eligibility Requirements
None
Duration
30
Minutes
Credits
(Credits must be evenly divisible by 0.5)
1
Timeslot Usage Limit
Hours
20000(only the administrator may change this value)

Figure 14 - Adding a New Study

To add a study, choose the Add New Study option from the top toolbar. You will need to pick from four possible types of studies, and may need to specify if the study is for credit or payment. Please choose these options carefully as you are not able to change them later.

After you choose the study type, you'll see a form asking for more information. You will need to fill out a number of fields, which are explained in the following table. Some of the fields listed below may not appear, depending on how your system is configured and the type of study you selected. All fields in the Basic Study Information section must be filled out unless otherwise noted.

Basic Study Information	
Field	**Explanation**
Study Name	A short name for the study. This is how the study is identified throughout the system. Most systems are configured so studies show in a random order to participants (choose Your Studies on the toolbar and it will state at the bottom of the resulting page if they are displayed in random order), so there is no advantage in choosing a study name that might put it at the top of an alphabetical list. You should consult with your administrator if there is a naming convention to be followed when naming studies. Study names must be unique, and you will be prevented from adding a study if there is already another study in the system with the same name. A study name may be up to 100 characters in length.
Brief Abstract (this feature might be disabled on your system)	This is a short one or two line description of the study. This short description will be displayed to participants when they view the entire list of studies, so you may want to list the most pertinent details here. Studies configured for payment often have the compensation information included here, particular if the payment varies based certain outcomes. This field may be optional, and can be up to 255 characters in length.
Detailed Description (this feature might be disabled on your system)	This can be a rather lengthy description about the study, and it will show if a participants clicks on the study to get more information, before they sign up. You may include basic HTML in this area, but please be sure you know what you are doing (ask

	your IT department for help if you are unsure). If you would like to add a carriage-return (paragraph break), simply type in "<p>" (without the quotes).This field may be optional. The maximum length of this field is 15,000 characters.
Eligibility Requirements	If there are any restrictions on who may participate (for instance, only those who are left-handed), list them here. Otherwise, leave the field as-is. If you list any restrictions, these will be displayed on the list of studies, when participants view a list of all available studies. Note the system does *not* enforce these restrictions, but it is expected a participant will only sign up for a study in which they are qualified, since they would otherwise fail to receive credit. In most cases, you will leave this field as-is and set prescreen participation restrictions instead (those are enforced automatically), which you can do after you add the study. This field may be up to 245 characters in length.
Duration	The amount of time, in minutes, that each study session will take. If you are setting up a 2-part study, then this setting applies to the first part of the study. For online studies, this should be an estimate of how long participants can expect the study to take, so that they can plan accordingly.
Credits (applies to credit studies only)	Enter the number of credits a participant will earn for the study. A value of 0 is acceptable, and may be desired in cases where the study is part of a set of studies, where only the final study is credit-earning. The credit value specified must be evenly divisible by the credit increment specified. For example, if the increment is 0.5, then the study can have credit values like 1 and 1.5, but not 0.75. If you are setting up a 2-part study, this is the value for the first part of the study. After a study has sign-ups, you may not change the credit value of the study. However, the

	administrator can still change the credit value of a study with pending sign-ups. If this is done, be sure to notify participants with pending sign-ups of the change, as the system will not notify them automatically. A study may not be changed between a study for credit and for payment, after it has been created.
Payment (applies to paid studies only)	Enter the compensation for the study. This is a text field, so any text may be entered like “Amazon Gift Card” or “Up to $20” and so on. Please see the Studies for Pay section of this documentation for more information on how to fill out this field in the case of paid studies. If you are setting up a 2-part study, this is the compensation for the first part of the study. You can change the payment text at any time. If this is done, be sure to notify participants with pending sign-ups of the change, as the system will not notify them automatically. The maximum length of this field is 30 characters. A study may not be changed between a study for credit and for payment, after it has been created.
Timeslot Usage Limit	Depending on how your system is configured, you may see an item that specifies the maximum number of study session hours available to this study. This value is set by the administrator, and only the administrator can adjust it. To determine the current session usage for a study, go to the Add A Timeslot page for the study, or to Timeslot Usage Summary.
Preparation	Enter any advanced preparation a participant must do here (e.g. “do not eat 2 hours before session”). If there are no preparation requirements, leave this field as-is.

Researcher(s)	Select the researcher for this study. Most likely, this is you, and your name will automatically be selected. If you are a researcher, then you may not remove yourself as the researcher (the P.I. for the study, as well as the administrator, can change the researcher). Depending on how your system is configured, you may be able to specify multiple researchers for a study. If you specify multiple researchers, each researcher has full control over the study. The selection box lists only users who are researchers.
Principal Investigator (this feature might be disabled on your system)	Select the Principal Investigator for this study. The person you select will have full access to the study. If you see this option, then you must select a P.I. The selection box lists only users who are principal investigators.
IRB Approval Code	Enter the IRB approval code here. This field is displayed to the administrator to help them keep track of studies. This field may be required depending on how your system is configured. If it is required, then only the administrator can change the IRB approval code, once it has been entered.
IRB Approval Expiration Date	The date when IRB approval expires. This field may not appear if your system is not configured for it. If it *does* appear, you must provide a valid expiration date. The system will prevent you from adding new timeslots to take place after this date, and your study will become inactive (not approved and thus not visible to participants) after this date. You may not make a study active if the IRB approval has expired. Only the administrator can change the IRB approval expiration date, once it has been entered, which is why it defaults to blank to force you to choose a date. You may specify a date up to 5 years in the future.
Approved?	Select Yes if this study should show up on the list of

	studies which participants may sign up for. Ensure you have received the necessary approvals to run the study before choosing Yes. A study must be Approved and Active to show up on the list of studies which participants may sign up for. If you select No, the study will not be visible to participants. Some systems are configured such that only the administrator can approve a study. If that is the case, you should contact the administrator when you are ready to make the study visible to participants – and a handy form is provided on the page to do so. As a researcher, you can always make an approved study invisible to participants (by making it not approved), but you may need the administrator to make it visible again. In addition, if you change key items about the study, specifically the name or descriptions, the study will automatically be made invisible to participants, until the administrator reapproves it (if the system is configured this way). The reason for this is that many IRBs approve very specific language for study names and descriptions, so the administrator needs to ensure the study is in proper compliance.
Email Approval Notice? (visible to administrators only)	This Yes/No option will appear if the administrator is adding or updating the study, and it is not already approved. If they select Yes to Email Approval Notice *and* they approve the study (set Approved to Yes) at the same time, then an email will be sent to all researchers for the study, to notify them that their study was just approved.
Active Study?	Select Yes if this study is in progress. You must select Yes and the study must be Approved if you want the study to show up to participants so they can sign up for it. If a study is Not Approved but *is* Active, then it does not show up (to participants) on the listing of studies, but it is accessible through other links if

	the participant has participated in it before and they are viewing their participation history (in case the participant has follow-up questions about the study). It will also show up on the study information page (for an individual study) when it is listed as a pre-requisite or disqualifier for a study. The reason to select No is if the study is being kept for historical purposes, but should not show up to participants on the list of studies they may sign up for. Often, this is done so the system can enforce pre-requisites, where the inactive study is a pre-requisite for an active study.
Advanced Settings	
Field	**Explanation**
Pre-Requisites (this feature might be disabled on your system)	If there are studies a participant must participate in before participating in your study, choose them here. You may select multiple studies if you like. You may specify that participants must have participated in *all* of the studies you specify, or *at least one* of the studies specified. The system will handle enforcement of the pre-requisites in a strict or lenient fashion depending on how your system is configured. In strict enforcement mode, the participant must have *received credit for* (participated in) the pre-requisite studies. In lenient enforcement mode, the participant must only be *scheduled* to participate in the pre-requisite studies (it is assumed they will go on to complete the pre-requisite studies). You can ask your administrator how this is configured, if it is of concern. If your system is in lenient enforcement mode, and a participant cancels a necessary pre-requisite for you study (they are warned of this situation), and you have configured your study so that the researcher will receive notifications of cancellations or sign-ups, then the researcher will

	receive notification of the pre-requisite problem and can contact the participant if necessary. Depending on how your system is configured (Pre-Requisite/Disqualifier Display setting), participants may or may not see which studies you have specified as pre-requisites when they go to view your study.
Disqualifiers (this feature might be disabled on your system)	If there are any studies a participant must *not* have participated in, please select them here. You may select multiple studies if you like. The system will handle enforcements of the restriction, during the sign-up process. If a participant has signed up for or participated in at least one of the studies specified as a disqualifier, then they will not be eligible to sign up for your study. Depending on how your system is configured (Pre-Requisite/Disqualifier Display setting), participants may or may not see which studies you have specified as disqualifiers when they go to view your study.
Course Restrictions	If you would only like participants enrolled in certain courses to participate in your study, select the eligible courses here. Participants who are not in at least one of the courses you selected will not see the study when they go to view the list of available studies. You may choose No Restrictions if you would like to make the study available to participants in any course. There is a limit to how many courses can be listed as course restrictions for a study, and the limit is somewhere between 60 and 80 courses. The limit is variable depending on a few factors, and the system will simply not save the course restrictions for any courses which would take it over the limit. Note that course restrictions do not function as a disqualifier but rather a qualifier. For example, if a participant is in both Course A and Course B, and

	the study is restricted to only those in Course A, the participant is eligible because they are in Course A, despite the fact Course B is not listed as a course restriction. In addition, using the same example above, the participant may assign the credit from the study to any of their courses, including those courses not listed in the course restriction (Course B in this example). Course Restrictions function solely to qualify participants for a study, and not to restrict their ability to assign credits to courses.
Invitation Code (this feature might be disabled on your system)	If you would like to have a special sign-up password for this study, enter it here. This is known as an invitation code, and applies just for this study. Participants must know the invitation code to sign up for this study. This is often used in cases where the researcher wants to personally select participants, so the researcher only provides the invitation code to the desired participants. Invitation codes are *not* case sensitive, and are in no way connected to any passwords users use to log in to the system. If you do not need an invitation code, leave this field blank.
Is this a web-based study? (this feature might be disabled on your system)	This will list if the study is an online study, and the type of online study. This setting cannot be changed after a study is added.
Study URL	The URL (web address, usually starting with https://) for your study. This is only required for web-based studies administered outside the system. If you are setting up a web-based study outside the system, and would like the system to pass a unique identifier in the URL so you may easily identify participants and even have the system grant credit automatically, add the text `%SURVEY_CODE%` in the URL where you would like the identifier to be placed. This feature is most commonly used with

	online survey products like Qualtrics, SurveyMonkey, LimeSurvey, SurveyGizmo, and similar products. This is discussed in further detail in the Web-Based (Online) Studies section of this documentation.
Study URL Display (external web studies only)	If set to Yes, then participants may still access the Study URL even after they have been marked as having participated in the study. If set to No, the URL will not be available to them. In all cases for external web studies, the URL will not be displayed until they have signed up for the study. In addition, regardless of this setting, the URL will not be displayed after the timeslot is in the past.
Participant Sign-Up Deadline (this feature might be disabled on your system)	Enter the deadline before the study is to occur that the participant may sign up, in whole hours.
Should the Researcher receive an email notification when a participant signs up or cancels?	If set to Yes, the researcher for this study will receive an email notification whenever a participant signs up, or cancels their sign-up, for this study. The email notification will be sent to an email address based on the information the researcher has provided. See the Email Address Options section of this documentation for more information on how the email address is determined. Emails will contain the first 50 characters of the study name as part of the subject line, to make it easy to sort the emails with an email program that supports filtering based on subject line. If set to Yes, researchers will also receive a notification if the system is in lenient pre-requisite enforcement mode and a participant cancels a study that was a pre-requisite for the current study. Read the section on Pre-Requisites in this table for more information about this situation.

	Emails are sent to all researchers specified for the study, unless a specific researcher is assigned to the timeslot that the email notification is being sent about. See Timeslots Linked to Specific Researchers for more information.
Researchers at Timeslot-Level	If set to Yes, it will be possible (but not required) to assign a specific researcher from the list of researchers for the study to a timeslot. If set to No, then it is assumed that all researchers assigned to the study are responsible for all timeslots. See Timeslots Linked to a Specific Researcher for more information. This option only appears if the system is configured to allow multiple researchers per study.
Automatic Credit Granting	If set to Yes, timeslots that are more than a specified number of hours old and still in the Awaiting Action state will be changed to a credit grant. The check for timeslots in this situation is made only once per day. If an automatic credit grant is done, you may still change it later if necessary. For online external web studies, the credit grant will take place the specified number of hours after the timeslot (participation deadline) has occurred (as opposed to being based on when the participant signed up), so this feature is generally not useful in this situation. This option will not appear for online survey studies (within the system) because credit granting generally occurs automatically, immediately after the participant completes the survey.
Can a participant sign up for this study more than once? (this feature might be disabled on your system)	If you would like to allow participant to sign up (and receive credit) for your study more than once (at different times), choose Yes. Otherwise, choose No. If No is chosen, participants may only sign up for the study more than once if they previously failed to show up for the study (a no-show).

Shared Comments	This is an optional area where you may enter any comments or notes about the study, which are visible to any researchers and PIs in the system, but not to participants. This field is useful if you want to make the technique used in the study visible to other researchers, so they can set your study as a disqualifier if necessary. The maximum length of this field is 1,000 characters.
Private Comments	This is an optional area where you may enter any comments or notes about the study, which are only visible to the researchers (and PI) for this study, and not to participants, nor to other researchers or PIs in the system. The maximum length of this field is 3,000 characters.
Research Alternative?	If set to Yes, then this study is considered a research alternative study. Some participants, for various reasons (typically for accruing too many unexcused no-shows, or being unable to consent to participate in studies), may be restricted such that they can only sign up for research alternative studies. Only an administrator may change this value (the default is No).
Two-part Study Settings (only applies if you select Two-Part Standard Study on the Select Study Type page)	
Field	**Explanation**
Is this a 2-part study?	Always set to Yes if you selected select Two-Part Standard Study on the Select Study Type page. Will not appear if you select another study type.
Credits, Part 2 (credit studies only)	Enter the number of credits for part 2 of the study, if this is a two-part study. A value of 0 is acceptable. The credit value specified must be evenly divisible by the credit increment specified. For example, if the increment is 0.5, then the study can have credit values like 1 and 1.5, but not 0.75.

Payment, Part 2 (paid studies only)	Enter the amount of compensation for part 2 of the study, if this is a two-part study.
Total Payment (paid studies only)	Enter the amount of total compensation for the study, typically the sum of the payment values for each part. The system cannot compute this automatically since it is possible to enter non-numeric values (e.g., “Amazon Gift Card”) in the other payment fields.
Part 2 Duration	The amount of time, in minutes, that part 2 of the study will take.
Part 2 Scheduling Range	Specify the number of days (as a range) after part 1 is scheduled, that part 2 should be scheduled. This setting only applies to two-part studies. The range may be the same value (e.g. “between 7 and 7 days”) if desired, but must be a whole number. See “Two-Part Studies” for more information.
Part 2 Scheduling Leniency	In some cases, you may want to ensure that the participant schedules the second part of the study to take place at exactly the same time (on a different date) as the first part. If so, choose Yes for this option. If there is some flexibility so they can sign up for any time within the Part 2 Scheduling range, choose No for this option.

Once you have filled out the appropriate information, save it and the system will be updated immediately with the information. If you would like to add participation restrictions based on prescreen responses, you can do so when you update the study (see Prescreen Participation Restrictions). Otherwise, your next step is likely to add timeslots (sessions). See the Working with Timeslots section of this documentation for more information.

If you need to update this study, see the Updating a Study section of this documentation.

Updating a Study

You may update any of your studies at any time. To do so, choose My Studies from the top toolbar, and you will see a list of your studies. Click on the desired study, and choose the Change Study Information link.

You will see a form remarkably similar to the one you used to add the study. A few options may no longer be changeable depending on the status of the study (e.g., if participants have already signed up for it). The fields shown are all the same as when you added the study. See the Adding a Study section of this documentation for an explanation of those fields.

The changes you make will be will be take effect immediately after they are saved. When changes are made, if administrator re-approval is required before a study is made visible to participants, then you should contact the administrator to request re-approval once you have made all your changes. Changing the following fields may require a re-approval: study name, brief abstract, detailed description, eligibility requirements (the text field, not specific restrictions like prescreen restrictions, study pre-requisites/disqualifiers, or course restrictions), duration, preparation, credit value (for credit studies only). There will be a notice on the Change Study Information to warn if re-approval may be required, and they system will also notify you, after making changes, if the study is now in need of re-approval. If re-approval is required and you are ready to request such approval, you may use the option to send such a request via the system – it's the same function you would have used to request initial study approval.

If you need to change the credit value for a study, and there is no option to do so, this means the study already has at least one participant signed up for it. You cannot change the credit value when a study is in this situation because there is no easy way to handle past credits for the same study (e.g. should old credit grants for the same study be adjusted to reflect the new credit value, or kept the same?). If the study is nearing the end of its run, and variable credit granting is enabled, then the easiest solution is to grant the new credit value to participants who sign up in the future. If you prefer that the credit value is changed for the entire study, contact the administrator, who can make the change for you. Note that if the study's credit value is changed while there are pending sign-ups, those participants are *not* notified of this change, so you will need to notify those participants of the change in credit value if necessary.

Deleting a Study

You may delete a study only if there are no pending sign-ups (awaiting action) nor active (non-zero) credits linked to it. If you need to delete a study which already has pending sign-ups or active credit grants, your better option may be to make it Inactive instead, if you do not want it to be visible to participants.

If you want to delete a study that has sign-ups and are unable to do so, please contact the administrator. The administrator can delete a study with sign-ups, but only if the sign-ups are all without credit values (this usually occurs when study participation history from a previous semester was retained, but credits were zeroed out). If the study has sign-ups where the sign-ups have (non-zero) credit values linked to them, then the administrator cannot delete the study until all those credit grants are changed to a 0 value (or the participants for the sign-ups are deleted). The reason for this restriction is to ensure that the credit count for participants where they have earned credits is accurate, which means that the studies which contributed to their credit earnings must be kept intact.

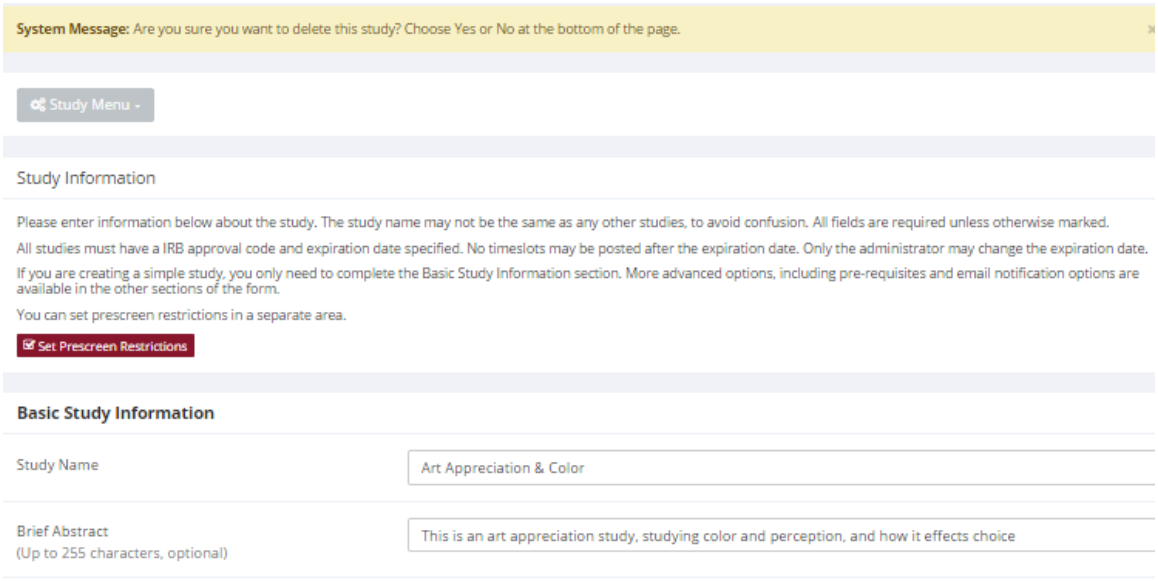

System Message: Are you sure you want to delete this study? Choose Yes or No at the bottom of the page.
Study Menu
Study Information
Please enter information below about the study. The study name may not be the same as any other studies, to avoid confusion. All fields are required unless otherwise marked.
All studies must have a IRB approval code and expiration date specified. No timeslots may be posted after the expiration date. Only the administrator may change the expiration date.
If you are creating a simple study, you only need to complete the Basic Study Information section. More advanced options, including pre-requisites and email notification options are available in the other sections of the form.
You can set prescreen restrictions in a separate area.
Set Prescreen Restrictions
Basic Study Information
Study Name
Art Appreciation & Color
Brief Abstract
(Up to 255 characters, optional)
This is an art appreciation study, studying color and perception, and how it effects choice

Figure 15- Deleting a Study

To delete a study, choose My Studies from top toolbar, click on the desired study, then choose the Delete Study option. You will see a confirmation page. Choose Yes (at the bottom of the page) to delete the study.

Once a study is deleted, it cannot be restored, so use this feature very carefully. If you delete an online survey study, the survey and all data collected will also be deleted.

Timeslot Usage Summary

The timeslot usage summary is available when viewing your study. This gives some basic information about timeslot utilization in the past and in the future, as well as some basic no-show information. It also gives information on timeslots for the study by location (if the study is not an online survey study or external web study), and by researcher (if the study is configured to allow researchers to be assigned to specific timeslots).

For credit studies, the system also provides a summary of how many credits were granted. This summary accurately computes credit usage, taking into account any variable credit grants (if Variable Credit Granting is enabled in System Settings), where some participants may have received credit in a different amount than the study's listed credit value.

If timeslot usage limits are enabled, the system will provide an estimate of how many timeslots can be added. Note that if the study is a two-part study, it will estimate based on allocating all the limit to the first part or the second part (both estimates are provided), however in practice it's more likely a researcher will want to add timeslots to both parts of the study, so this should be taken into account when viewing these estimates, especially if the first part and second part of a study have a different duration.

Bulk Mail Summary

The system tracks whenever any type of bulk email is sent (by a user) related to the study. This includes inviting qualified participants based on the study's prescreen participation restrictions, or contacting those who have already signed up for the study. This information is kept for 6 months, and it is tracked to ensure that all users follow generally accepted Internet practices for responsible use of email. The administrator also has access to this information.

Prescreen Participation Restrictions

If enabled on your system, the system might contain an online prescreen that participants may (or must, depending on your system configuration) complete. You may place participation restrictions on your study based on prescreen responses. Participants are unaware that such restrictions are placed on the study. These restrictions are never listed to them. If they do not qualify to participate in a study because they do not meet the prescreen participation restrictions, then the study will simply not be listed to them. This is important to note – participants never know why a study was or was not listed to them, because they are unaware of the prescreen restrictions.

You may restrict a study on any question or questions on the prescreen that allowed for a multiple-choice answer where only one choice could be selected. You may also restrict a study based on a computed section sum or average score for a participant, if the prescreen was set up in such a manner. You may restrict to one choice or many choices for any question. If you restrict on multiple questions, it is the same as a logical "AND." For example, if you setup the prescreen restrictions so that participants must have answered "Yes" to a "Do you wear glasses?" question and "Blue" or "Grey" to "What color are your eyes?", then they must meet *both* requirements to participate. In other words, only participants who wear glasses and have either blue or grey eyes are eligible. There is no support for a logical "OR" restriction across multiple questions. The restrictions are inclusive, which means that if you select a choice as a restriction, then participants must have answered at least one of the choices selected for each question that is part of the restriction in order to see and participate in the study, as opposed to exclusive where checking the choice as a restriction would exclude them from participation.

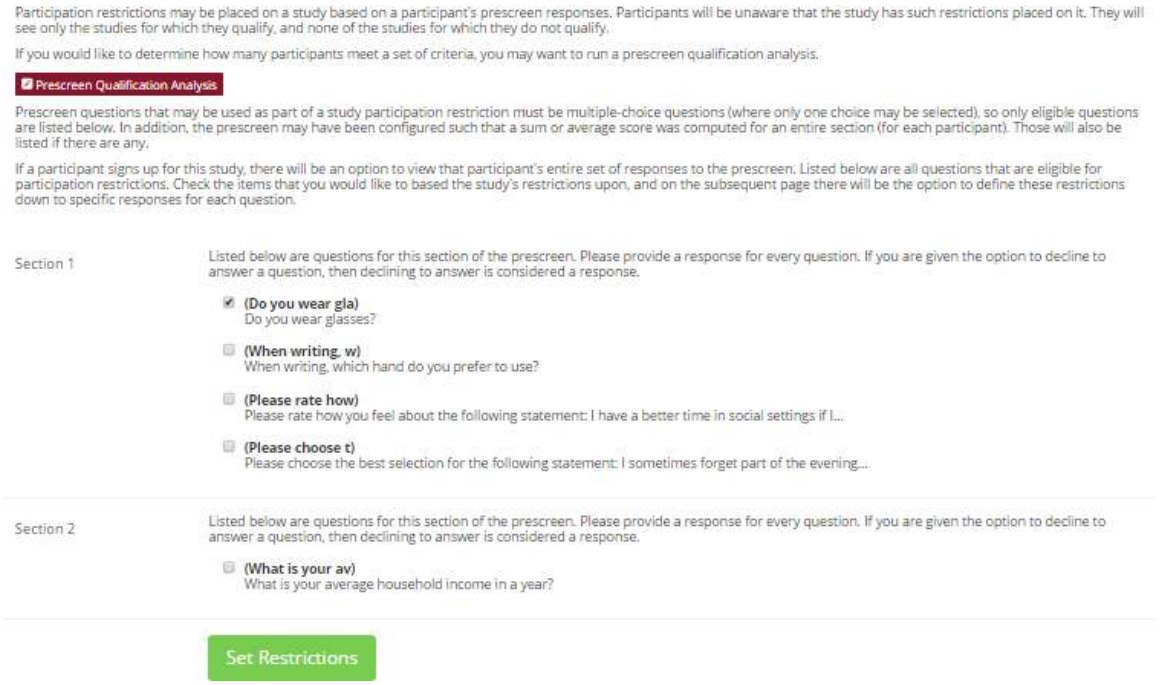

Participation restrictions may be placed on a study based on a participant's prescreen responses. Participants will be unaware that the study has such restrictions placed on it. They will see only the studies for which they qualify, and none of the studies for which they do not qualify.
If you would like to determine how many participants meet a set of criteria, you may want to run a prescreen qualification analysis.
Prescreen Qualification Analysis
Prescreen questions that may be used as part of a study participation restriction must be multiple-choice questions (where only one choice may be selected), so only eligible questions are listed below. In addition, the prescreen may have been configured such that a sum or average score was computed for an entire section (for each participant). Those will also be listed if there are any.
If a participant signs up for this study, there will be an option to view that participant's entire set of responses to the prescreen. Listed below are all questions that are eligible for participation restrictions. Check the items that you would like to based the study's restrictions upon, and on the subsequent page there will be the option to define these restrictions down to specific responses for each question.
Section 1
Listed below are questions for this section of the prescreen. Please provide a response for every question. If you are given the option to decline to answer a question, then declining to answer is considered a response.
(Do you wear gla)
Do you wear glasses?
(When writing, w)
When writing, which hand do you prefer to use?
(Please rate how)
Please rate how you feel about the following statement: I have a better time in social settings if I...
(Please choose t)
Please choose the best selection for the following statement: I sometimes forget part of the evening...
Section 2
Listed below are questions for this section of the prescreen. Please provide a response for every question. If you are given the option to decline to answer a question, then declining to answer is considered a response.
(What is your av)
What is your average household income in a year?
Set Restrictions

Figure 16 - Prescreen Restrictions Question Selection

To set participation restrictions, view (do not choose edit) your study and choose View/Modify Restrictions. You will see a list of eligible questions which you may use for your restrictions. If the study already has some restrictions, those will be checked, and you will see how many participants currently meet the restrictions. Choose the questions you would like to restrict upon (and keep the existing checked restrictions checked, unless you want to remove that restriction), and click on the Set Restrictions button. On the subsequent page, you can select each value that is acceptable for each question you have chosen. Once you have selected all the acceptable values, save your changes and they will take effect immediately. It is important to note that if you change the restrictions, it will *not* remove the study sign-ups for participants who qualified under the previous set of restrictions, because restrictions are enforced at the time the participant signs up for the study. For this reason, you should probably decide on your restrictions before making the study available to participants.

If you have restriction requirements where you would like to restrict participation to a percentage of the population (for instance, the responses that were chosen by the top 25% of people), but you are not sure which responses meet this requirement, you can use the prescreen response analysis feature to determine the valid responses. See Prescreen Response Analysis for more information. You may also use Analyzing Prescreen Responses to get an idea of how many participants are potential candidates for participation in your study, based on a specified set of restrictions.

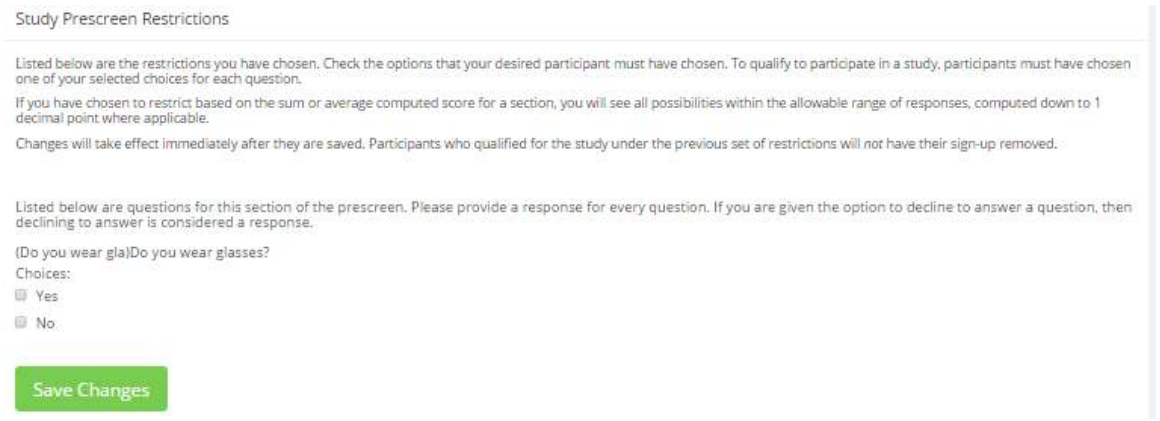

Study Prescreen Restrictions
Listed below are the restrictions you have chosen. Check the options that your desired participant must have chosen. To qualify to participate in a study, participants must have chosen one of your selected choices for each question.
If you have chosen to restrict based on the sum or average computed score for a section, you will see all possibilities within the allowable range of responses, computed down to 1 decimal point where applicable.
Changes will take effect immediately after they are saved. Participants who qualified for the study under the previous set of restrictions will not have their sign-up removed.
Listed below are questions for this section of the prescreen. Please provide a response for every question. If you are given the option to decline to answer a question, then declining to answer is considered a response.
(Do you wear gla)Do you wear glasses?
Choices:
Yes
No
Save Changes

Figure 17 - Prescreen Response Restrictions

Inviting Qualified Participants to a Study

While viewing the list of prescreen restrictions currently set for a study, and the number of participants who meet those restrictions, you may see the option to Invite Qualified Participants. Using this option, you may craft an email to be sent to all qualified participants. You may choose to exclude those who have already signed up for or participated in any studies you specify, and this disqualifier list will be pre-populated based on any disqualifiers already set for the study. The system will automatically exclude all participants who have participated or are signed up for the current study (no-shows are not excluded though, since they may sign up again). If the study is not a research alternative study, the system will also automatically exclude participants with Limited accounts, as they are ineligible to participate in studies not marked as a research alternative study.

The system will pre-fill the email text with useful information like the name of the study and how many timeslots are currently open. You cannot include attachments in the email, so if you have a document you would like to include, you should post it on some other website and provide a link to the document in the email you send.

If you have set participation restrictions for the study based on course enrollment, those restrictions will be taken into consideration (i.e. abided by) when determining which participants receive the email.

There is also an option to choose a random percentage from the overall list of matching participants to email. It is important to note that the system does not keep track of which random percentage of the group of matching participants is sent to each time, so that if you send to a random 30% now, and a random 30% an hour later, it could very well be the case that many participants receive the email on both those occasions.

The From (sender) address on the email will be the administrator email address, which is done to prevent the email from being blocked by junk email filters. The “Reply To” address of the email will be that of the user who is actually sending the email, so when a participant chooses to reply to the email, the reply will be sent to that (the reply to) address.

Finally, there is an option to specify a delay in sending the email, based on the number of hours from when the emailing option is used. This is useful if you want to target a certain time of day (e.g., during the evenings) when the email will be sent. The emails are generated at the time you use the emailing facility, but are stored on the server's outgoing email queue until the specified sending time. They cannot be removed from the queue once this emailing facility is used.

In some cases, the administrator may have imposed a limit on how many participants may be emailed. This is often done to prevent abuse of the system, such as cases where researchers invite too large a number of participants and this is not in accordance with generally accepted Internet principles for sending email. If there is such a limit, the system will look at the number of participants the researcher plans to email, and if that number is greater than the limit, it will block the sending entirely, as opposed to sending only enough emails up to the limit. To get around this limitation, the researcher can further restrict who they plan to send to (perhaps choosing a smaller random percentage of users, or more closely defined prescreen participation restrictions), or ask the administrator to send the email for them. The administrator is not subject to such limitations. Regardless, any use of this bulk email facility will be logged, and that information will be kept for approximately 6 months. The administrator can easily pull up a report of how many emails a specific researcher has sent, so it is wise to be careful about not abusing this feature. In addition, Sona Systems reserves the right to temporarily remove the right to login from a researcher if there are verifiable reports of abuse of this feature. Typically before doing so, the administrator will be notified by Sona Systems as it is preferred to have the administrator deal with such problems.

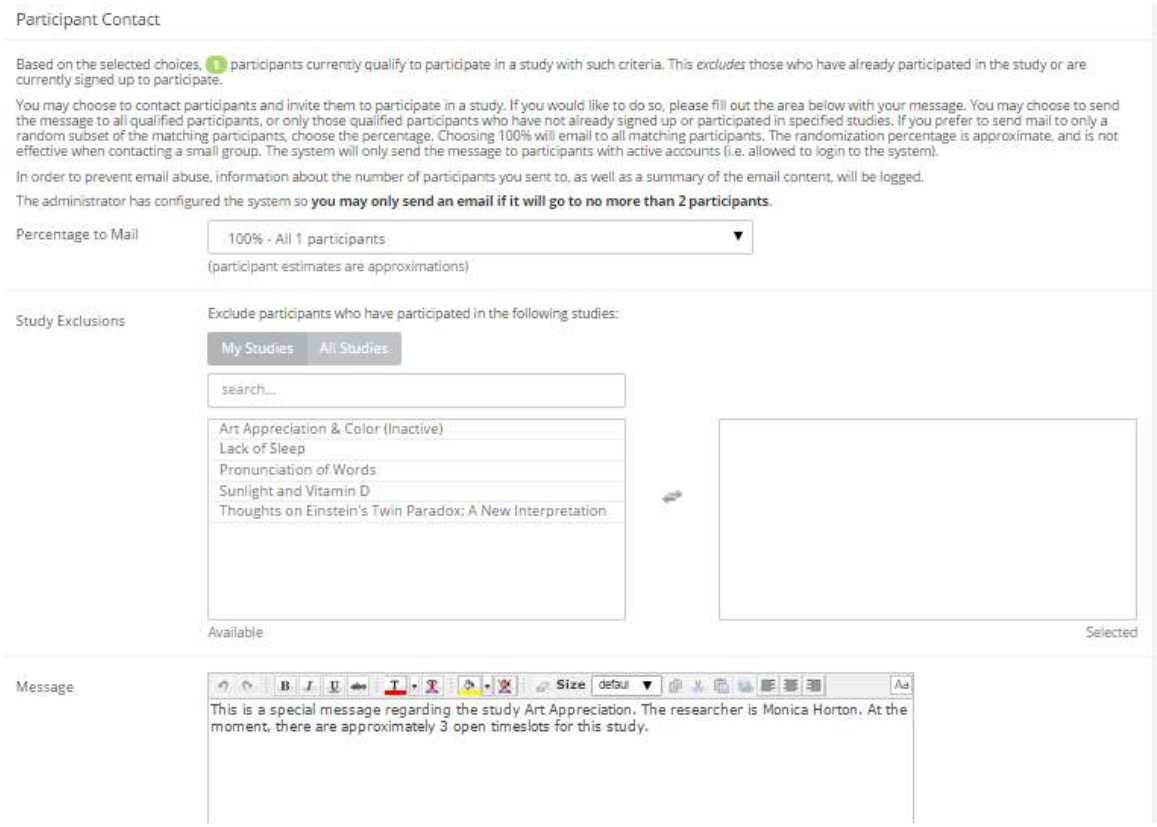

Participant Contact
Based on the selected choices, 1 participants currently qualify to participate in a study with such criteria. This excludes those who have already participated in the study or are currently signed up to participate.
You may choose to contact participants and invite them to participate in a study. If you would like to do so, please fill out the area below with your message. You may choose to send the message to all qualified participants, or only those qualified participants who have not already signed up or participated in specified studies. If you prefer to send mail to only a random subset of the matching participants, choose the percentage. Choosing 100% will email to all matching participants. The randomization percentage is approximate, and is not effective when contacting a small group. The system will only send the message to participants with active accounts (i.e. allowed to login to the system).
In order to prevent email abuse, information about the number of participants you sent to, as well as a summary of the email content, will be logged.
The administrator has configured the system so you may only send an email if it will go to no more than 2 participants.
Percentage to Mail
100% - All 1 participants
(participant estimates are approximations)
Study Exclusions
Exclude participants who have participated in the following studies:
My Studies
All Studies
search...
Art Appreciation & Color (Inactive)
Lack of Sleep
Pronunciation of Words
Sunlight and Vitamin D
Thoughts on Einstein's Twin Paradox: A New Interpretation
Available
Selected
Message
Size
This is a special message regarding the study Art Appreciation. The researcher is Monica Horton. At the moment, there are approximately 3 open timeslots for this study.

Figure 18 - Contacting Qualified Participants

Viewing Your Studies

To view your studies (and not the studies of others), choose the My Studies option on the top toolbar. The system will list all your studies in alphabetical order by study name, grouped by studies that are active, then inactive studies. You may use the tabs along the top to toggle among viewing all your studies, and only those that are active or inactive.

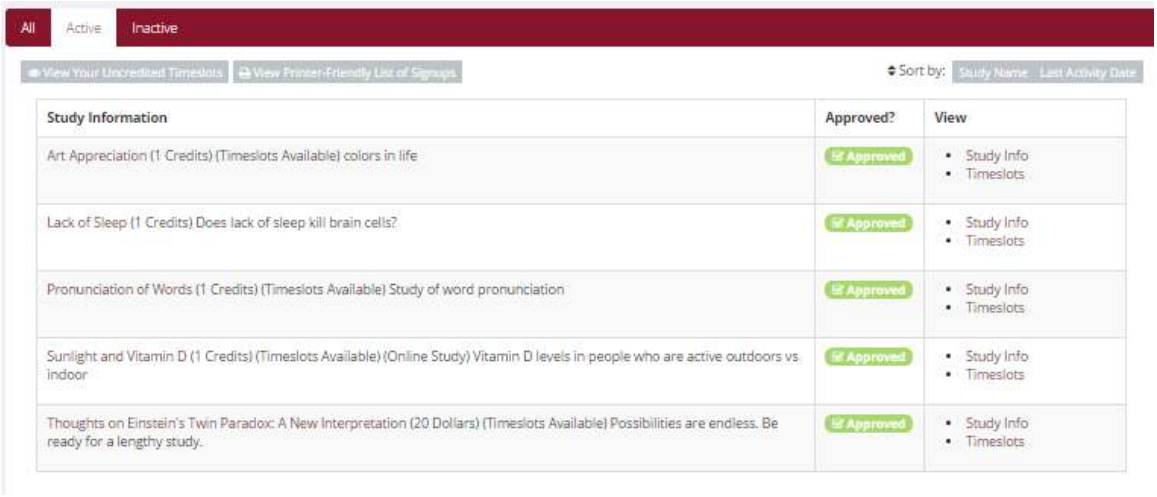


Figure 19 - Your Studies

Participant Study View

If you would like to see how your study appears when participants view it, find your study and choose the Participant Study View option. This will show exactly how the study appears to participants, with the exception that when a participant views a study, next to each pre-requisite and disqualifier study (for a study) is listed a status indicator about whether they have met that requirement. In Participant Study View, the pre-requisite and disqualifier studies are listed, but there is no status indicator next to each study in the list.

If for some reason you think your study is not visible to participants, it may be due to various restrictions you have set on the study, like prescreen participation restrictions, such that few (or none) of the participants in the pool qualify. You can ask the administrator to use the Check Study Configuration tool (available to them when they view your study) to provide advice on why your study may or may not be visible to participants. Administrators there also have an option to input a specific participant to see if that participant would qualify for your study.

Viewing Other Studies

To view all studies that are visible to participants, choose the All Studies option from the top toolbar.

You will see a list first of all Active studies. These studies will show up to participants on the list of available studies. The next group of studies (if there are any) is Inactive studies. These will *not* show up on the list of available studies (to participants), but participants can access information about these

individual studies on links from the page with their progress (if they participated in the study) or if another study has the Inactive study listed as a pre-requisite or disqualifier.

Online External Studies

Online external studies are online studies which are not hosted within the system, but instead reside on some other website. This is different from online survey studies (detailed later in this documentation), where an online survey is set up directly in the system and no other website is involved.

For online external studies, you may want to develop some method of linking the participant's sign-up in the system to your online study, so you know who to grant credit to. One way to do this is to ask the participant's name (or some other identifying information) that will make it easy to locate their sign-up within the system and grant them credit once they have completed your online study. Another method of tracking, which reduces the chance of human error, is to use the Survey Code feature described later in this section. The most automated approach is to use the External Study Credit Granting feature, where the participant receives credit automatically as soon as they finish the study.

Note that if External Study Credit Granting is not used, the system will *not* automatically grant credit once the participant has finished the study, and the reason is that the system does not know when something occurred on a website outside the system. In this case, researchers should routinely login and grant credit as necessary.

External Study Credit Granting

With External Study Credit Granting, a participant can receive credit as soon as they finish the online external study. This is accomplished by having the external study notify the system that the participant has completed the study and thus deserves credit.

If you are using a popular commercial product like Qualtrics, SurveyMonkey, SurveyGizmo, LimeSurvey, FluidSurveys, or Inquisit, then skip this section and go to one of the following sections that provide specific instructions for each product. In addition, it may be easier to use the online integration instructions available for each product at http://www.sona-systems.com/help instead of this documentation. The reason is that those products may have been updated since this documentation was produced, and the online integration instructions are updated more frequently.

What follows in this section is a general description of the integration process if you are *not* using one of the commercial survey products listed above. If you *are* using one of those products, then skip to the relevant section (or the online integration instructions) instead.

The notification to the system is done by accessing the Completion URL for the study. A properly-configured study will have up to two Completion URLs:

1. **Client-Side Completion URL**: If this URL is loaded, the participant will receive credit. Typically, this URL would be loaded by the participant clicking on a link in their browser, or the participant

being redirected to this link after completing the study. This is the most common method used for commercial survey product where there is not already a built-in integration.

2. **Server-Side Completion URL**: This URL would typically be loaded by the external study (not clicked by the end-user participant) and is a server-to-server communication between the external study and the system. The results are returned in XML format and may be parsed by the external study. This method would be used when you have full control over the external study, like if it is programmed from a Perl script. It also provides more control and security than the client-side method.

You should use only *one* completion URL to achieve credit granting. For most commercial online survey products, and also if you are not familiar with programming, then the client-side completion URL is likely the most appropriate option. To avoid confusion, the system will only display the client-side completion URL if a commercial survey product is being used and is known to support only the client-side completion URL.

To see the completion URLs for your study, first ensure the study is set up correctly as an online external study. Then, enter the URL for the external site in the Study URL field in Change Study Information, and save your changes. Next, click on Change Study Information again and modify the Study URL to include `%SURVEY_CODE%` in the URL in the appropriate place. If you entered the URL for a commercial product like SurveyMonkey, Qualtrics, or Inquisit, then the system will display help text just below the URL with a suggestion for how to include this. Save your changes, and the Completion URLs should now appear on the resulting study information page. In short, the Completion URLs will appear as long as there is `%SURVEY_CODE%` anywhere in the Study URL.

The client-side completion URL will look something like this:

```
https://yourschool.sona-
systems.com/webstudy_credit.aspx?experiment_id=123&credit_token=9185d436e5f94b1581b
0918162f6d7e8&survey_code=XXXX
```

The server-side completion URL will look something like this (if displayed):

```
https://yourschool.sona-
systems.com/services/SonaAPI.svc/WebstudyCredit?experiment_id=123&credit_token=9185
d436e5f94b1581b0918162f6d7e8&survey_code=XXXX
```

In the example above, the XXXX at the end is to show where the survey code number should be placed (in place of XXXX) by the external study website.

The next step is you'll need to configure the online external study to receive the survey code number *from* the system at the start of the study, and also to load one of the completion URLs at the end of the study, while replacing XXXX with the survey code number and pass that *to* the system in the completion URL. Because this involves configuring the external study which is not part of the system, then how this is accomplished depends on the external study software. Usually it involves setting up the survey code number as some type of variable that is passed in via the URL, and then configuring a redirect URL at the end of the study to be loaded, with this variable in the URL.

As this is a complicated feature, the best method to test it is to actually login to the system as a fake participant. The entire credit granting process is not possible to test as a researcher, since researchers cannot sign up for studies. To ensure other (real) participants do not sign up for the study while you are testing it, add an Invitation Code to the study (you can remove it later).

The configuration directions for some popular survey products are below, based on information from those vendors.

External Study Credit Granting with SurveyMonkey

With SurveyMonkey, note that some of the features used within SurveyMonkey may vary depending on your subscription level with SurveyMonkey. In most cases, you will need to have their Gold or Platinum package in order to make use of the Custom Redirect feature necessary for study credit granting to work properly.

Here are the basic steps, which are subject to change (since the product is controlled by SurveyMonkey):

1. In the system, change the Study URL so it includes `%SURVEY_CODE%` in the URL. So if the SurveyMonkey URL is `http://www.surveymonkey.com/s/H2Y9H27` then change it to `http://www.surveymonkey.com/s/H2Y9H27?c=%SURVEY_CODE%`
2. Having completed Step 1, the Study Information on your Sona Systems site now displays a URL labeled "SurveyMonkey Redirect to a URL". In SurveyMonkey, configure the survey to accept the survey code number, as a collector. Click on the "Collect Responses" tab.
3. In SurveyMonkey, configure the Survey Completion option to “redirect to your own webpage”, and provide the SurveyMonkey Completion URL from the system. By doing this, SurveyMonkey will put in the survey_code number passed to the collector. If Steps 1 and 2 were completed correctly, then SurveyMonkey will add in the parameter automatically when it redirects the user. So if the SurveyMonkey Completion URL will look something like this:
   `https://yourschool.sona-systems.com/webstudy_credit.aspx?experiment_id=170&credit_token=9185d436e5f94b1581b0918162f6d7e8`

These features are described on SurveyMonkey’s site at the following URLs:

- http://help2.surveymonkey.com/articles/en_US/SurveyMonkeyArticleType/Can-I-pass-a-unique-ID-through-the-link-and-then-through-a-redirect-URL (“Can I pass a unique ID through the link and then through a redirect URL?”)
- http://help2.surveymonkey.com/articles/en_US/SurveyMonkeyArticleType/Can-I-redirect-respondents-to-a-different-website-upon-completion (“Can I redirect respondents to a different website upon completion?”)

The SurveyMonkey Completion URL provided by the system should be sufficient to paste directly into SurveyMonkey. If you prefer to derive the URL from the Client-Side Completion URL, then you simply need to *remove* the `&c=XXXX` from the end of Client-Side Completion URL and place the remaining text in SurveyMonkey.

External Study Credit Granting with Qualtrics

Here are the basic steps, which are subject to change (since the product is controlled by Qualtrics):

1. In the system, change the Study URL so it includes `&id=%SURVEY_CODE%` in the URL. So if the Qualtrics URL (Anonymous Survey Link) is `https://yourschool.qualtrics.com/SE/?SID=SV_b9ZD41hMZaqE` then change it to `https://yourschool.qualtrics.com/SE/?SID=SV_b9ZD41hMZaqE&id=%SURVEY_CODE%`
2. Having completed Step 1, the Study Information on your Sona Systems site now displays a URL labeled "Qualtrics Redirect to a URL". In Qualtrics, configure the survey to accept the survey code number, as an embedded data field named "id". Remember to use lower-case as this is case-sensitive. To do this, go to Survey Flow | Add a New Element | Embedded Data and type in "id" and save your changes.
3. In Qualtrics, configure the Survey Options | Survey Termination | Redirect to a URL option, and provide the Qualtrics Redirect to a URL value from your Sona Systems site. (You may simply copy and paste the unaltered value from Sona into Qualtrics).

   Note: If you have an End of Survey element set up in Survey Flow, you will need to add the URL there also. Go to Survey Flow | End of Survey | Customize and enter the Qualtrics Redirect URL value from the system into the Redirect to a URL field in Qualtrics.

These features are described on Qualtrics' site at the following URL:

- http://www.qualtrics.com/university/researchsuite/developer-tools/api-integration/passing-information-through-query-strings/ ("Passing Information Through Query Strings")

The Qualtrics Redirect to a URL provided by the system should be sufficient to paste directly into Qualtrics. If you prefer to derive the URL from the Client-Side Completion URL, then you simply need to change the `&c=XXXX` at the end of Client-Side Completion URL to `${e://Field/id}`

External Study Credit Granting with SurveyGizmo

With SurveyGizmo, it is best to follow the URLs listed below that describe the process in detail on the SurveyGizmo website. In those documents, "panel company" refers to our system, and you will only need to focus on the Completed Surveys Link. The Over Quota and Disqualified links are not applicable or implemented in this situation. Note that some of the SurveyGizmo features described below may not be available to all SurveyGizmo subscription levels.

Here are the basic steps, which are subject to change (since the product is controlled by SurveyGizmo):

1. In the system, change the Study URL so it includes `%SURVEY_CODE%` in the URL. So if the SurveyGizmo URL is `http://www.surveygizmo.com/s3/12345/my-survey` then change it to `http://www.surveygizmo.com/s3/12345/my-survey?scode=%SURVEY_CODE%`
2. Having completed Step 1, the Study Information on your Sona Systems site now displays a URL labeled "SurveyGizmo Redirect to a URL". In SurveyGizmo, configure the survey to accept the

survey code number, via a Hidden Field with a URL Variable named "scode". To do this, go to Build & Edit | Select Add Action on the first page of the survey. Pick the name "Sona Survey Code" for the action, and click on Add & Edit Action. In the Value section, first click on Insert Merge Code and choose URL Variable. Then, in the Value section, type in [url("scode")]

3. In SurveyGizmo, configure the URL Redirect for completed surveys. On the *Thank You* page section, go to Add Action | URL Redirect (in Edit Text Elements). Pick some name for the action, and click on Add & Edit Action. In the URL field provide the SurveyGizmo Redirect URL from the system. The SurveyGizmo Redirect URL should look something like this: `yourschool.sona-systems.com/webstudy_credit.aspx?experiment_id=170&credit_token=9185d436e5f94b1581b0918162f6d7e8`
4. Next, on that same page in SurveyGizmo, choose Add Field and choose the question named "Sona Survey Code" from the options and choose Add Field. Then, in the Variable Name textbox, type in `survey_code` and save your changes.

These features are described on SurveyGizmo's site at the following URLs:

- http://surveygizmov4.helpgizmo.com/help/article/link/panel-integration ("Panel Integration")
- http://surveygizmov4.helpgizmo.com/help/article/link/url-merge-codes ("Using URL Variables/Query Strings")

The SurveyGizmo Redirect URL provided by the system should be sufficient to paste directly into SurveyGizmo. If you prefer to derive the URL from the Client-Side Completion URL, then you simply need to *remove* the `&survey_code=XXXX` from the end of Client-Side Completion URL and also the https:// (or http://) from the beginning, and place the remaining text in SurveyGizmo.

External Study Credit Granting with LimeSurvey

With LimeSurvey, the instructions below are for version 2.05+ and newer. At a minimum, be sure you are using version 2.0 build 130526 or newer. Earlier versions contain some bugs that will prevent things from working properly.

Here are the basic steps, which are subject to change (since the product is controlled by LimeSurvey):

1. In the system, change the Study URL so it includes `%SURVEY_CODE%` in the URL. So if the LimeSurvey URL is `http://limesurvey.yourschool.edu/index.php/651365/lang-en` then change it to `http://limesurvey.yourschool.edu/index.php/651365/lang-en?id=%SURVEY_CODE%`

   Note: In versions of LimeSurvey prior to 2.05+, the LimeSurvey URL format was different. If you see a `/` instead of a `?` after index.php in the URL, then add `?id=%SURVEY_CODE%` (so change the `&` to a `?`) to the end of the URL when entering the Study URL.
2. Having completed Step 1, the Study Information on your Sona Systems site now displays a URL labeled "LimeSurvey Redirect to a URL". In LimeSurvey, configure the survey to accept the survey code number, as URL Parameter named "id". To do this, go to General Settings | Panel Integration and add the URL parameter there, with no target question. Remember to use

lower-case as this is case-sensitive, and be sure to click Save for both the new parameter and panel settings.

3. In LimeSurvey, configure the End URL (in Edit Text Elements), and provide the LimeSurvey End URL from the system. The LimeSurvey URL should look something like this: `https://yourschool.sona-systems.com/webstudy_credit.aspx?experiment_id=123&credit_token=4e48f9b638a&survey_code={PASSTHRU:id}` If (and only if) you do not see a LimeSurvey End URL in the system, then proceed with the rest of this step. Otherwise, proceed to the next step.
   In LimeSurvey, configure the End URL (in Edit Text Elements), and provide the Client-Side Completion URL from the system. However, you need to change the XXXX at the end of the URL, and instead have LimeSurvey put in the survey_code number passed as a pass-through variable. So if the client-side completion URL was `https://yourschool.sona-systems.com/webstudy_credit.aspx?experiment_id=170&credit_token=9185d436e5f94b1581b0918162f6d7e8&survey_code=XXXX` then enter it in LimeSurvey as `https://yourschool.sona-systems.com/webstudy_credit.aspx?experiment_id=170&credit_token=9185d436e5f94b1581b0918162f6d7e8&survey_code={PASSTHRU:id}`
4. Note that if, after saving the End URL, you see an & in place of & in the End URL field, then you need to instead set this value while logged into LimeSurvey as an administrator. This is due to a bug in LimeSurvey (bug 7827) that was fixed in version 130526.
5. In LimeSurvey, set "Automatically load URL when survey complete?" to Yes on General Settings | Presentation & Navigation. This is due to a bug in LimeSurvey (bug 7826), where the survey code will not be properly passed through if this setting is set to No.

These features are described on LimeSurvey's site at the following URL:

- http://manual.limesurvey.org/wiki/URL_fields ("URL Fields")

External Study Credit Granting with Inquisit

Inquisit is a product offered by Millisecond Software, and the instructions below apply to Inquisit Web Edition only.

Here are the basic steps, which are subject to change (since the product is controlled by Millisecond):

1. In the system, change the Study URL so it includes `%SURVEY_CODE%` in the URL. So if the Inquisit URL is `http://research.millisecond.com/myexperiment.web` then change it to `http://research.millisecond.com/myexperiment.web?survey_code=%SURVEY_CODE%`
2. Having completed Step 1, the Study Information on your Sona Systems site now displays a URL labeled "Inquisit Redirect to a URL". In Inquisit, use the web script registration wizard to configure the survey to accept the survey code number. On the part where it asks how to generate subject IDs, select Query Parameter and enter in "survey_code".
3. In Inquisit, configure the Finish Page URL, and provide the Inquisit Finish Page URL from the system. The Inquisit Finish Page URL should look something like this: `https://yourschool.sona-systems.com/webstudy_credit.aspx?experiment_id=170&credit_token=9185d436e5f94b1581b0918162f6d7e8`

These features are described on Millisecond's site at the following URL:

- http://www.millisecond.com/support/docs/v3/html/howto/interopsurveys.htm ("How to Interoperate Inquisit Web Edition with Online Survey Packages")

The Inquisit Finish Page URL provided by the system should be sufficient to paste directly into Inquisit. If you prefer to derive the URL from the Client-Side Completion URL, then you simply need to *remove* the `&c=XXXX` from the end of Client-Side Completion URL and place the remaining text in Inquisit.

External Study Credit Granting with QuestionPro

Note that some of the features used within QuestionPro may vary depending on your subscription level with them. In most cases, you will need to have their Corporate Edition in order to make use of the Automatic Redirect feature necessary for study credit granting to work properly.

Here are the basic steps, which are subject to change (since the product is controlled by QuestionPro):

1. On your Sona Systems site, change the Study URL so it includes ?custom1=%SURVEY_CODE% in the URL. So if the QuestionPro URL is: `http://questionpro.com/t/AIZBjs6` then change it to `http://questionpro.com/t/AIZBjs6?custom1=%SURVEY_CODE%`
2. Having completed Step 1, the Study Information on your Sona Systems site now displays a URL labeled "QuestionPro Automatic Redirect URL". In QuestionPro, configure the Finish option in Settings | Finish Options (like in the image below). Choose the Automatic Redirect Option, and provide the QuestionPro Automatic Redirect Website Address from the Sona system in the Website Address field. By doing this, QuestionPro will put in the survey_code number passed to it.
3. If Steps 1 and 2 were completed correctly, then QuestionPro will add in the parameter automatically when it redirects the user. So if the QuestionPro Automatic Redirect Website Address will look something like this: `https://yourschool.sona-systems.com/webstudy_credit.aspx?experiment_id=123&credit_token=4e48f9b638a&survey_code=${custom1}`

These features are described on QuestionPro's's site at the following URL:

- http://www.questionpro.com/help/131.html (QPro custom variables in URLs)

External Study Credit Granting with Fluidsurveys

With FluidSurveys, note that some of the features used within FluidSurveys may vary depending on your subscription level with FluidSurveys. In most cases, you will need to have their Enterprise version in order to make use of the "Custom Variables in Publish URL" feature necessary for study credit granting to work properly.

Here are the basic steps, which are subject to change (since the product is controlled by Fluidsurveys):

1. On your Sona Systems site, change the Study URL so it includes ?id=%SURVEY_CODE% in the URL. So if the Fluidsurveys URL is: `http://fluidsurveys.com/surveys/abc/def/`

then change it to
`http://fluidsurveys.com/surveys/abc/def/?id=%SURVEY_CODE%`

2. Having completed Step 1, the Study Information on your Sona Systems site now displays a URL labeled "FluidSurveys Redirect to a URL". On FluidSurveys, go to the Redirection settings and click on the "Pass through GET variables received from the survey entrance page". Then on Survey Complete Redirect, place the Survey Complete Redirect URL on there. It should look something like this: `https://yourschool.sona-systems.com/webstudy_credit.aspx?experiment_id=123&credit_token=4e48f9b638a&survey_code={{GET_variable.id}}`

More info on how to change these settings can be found here:

- http://help.fluidsurveys.com/hc/en-us/articles/201292424-Redirecting-Using-Advanced-Branching
- http://help.fluidsurveys.com/hc/en-us/articles/200132619-Setting-Redirection-Options

The Inquisit Finish Page URL provided by the system should be sufficient to paste directly into Inquisit. If you prefer to derive the URL from the Client-Side Completion URL, then you simply need to *remove* the `&c=XXXX` from the end of Client-Side Completion URL and place the remaining text in Inquisit.

Client-Side Completion URL Responses

For help in testing, listed below are the possible messages that the participant will see when they are redirected to the client-side completion URL. Note that if the system has a language enabled other than English, then the message will be displayed in the participant's preferred language, instead of English (unless their language preference is English of course).

Status Message	**Explanation**
Web study credit successfully granted.	The credit was granted successfully.
No credit given, because you are not a participant, and therefore cannot sign up for this study.	A non-participant account (e.g., the researcher) accessed the URL, but the URL was accessed correctly. Usually this happens when a non-participant clicks on the Sample Link with Embedded ID Code link from the study. This message will occur when testing the credit granting setup, and it's a sign that everything is set up correctly.
Invalid experiment_id or credit_token.	The experiment_id or credit_token in the completion URL was invalid. As this does not change for each participant, this is most likely to occur if the completion URL was somehow incomplete or truncated.

Invalid survey_code.	The survey_code was not specified at all, or was blank. This may indicate the external study is not properly placing the survey_code in the completion URL.
Invalid survey_code. ## [some number]	The survey_code was provided, but is not valid for this study.
You have already received credit for this study. / You have already participated in this study.	The participant has already participated in this study and received credit/been marked as participated.
You are not eligible to participate in this study.	The participant has already signed up for this study, but has been marked as a no-show, and has no other signups for this study which are in Awaiting Action state.
Web study credit grant error. ## [some number]	Some other generic error. Please contact Technical Support for more information.

Server-Side Completion URL Responses

For help in testing, listed below are the possible messages that the system will give if the Server-Side Completion URL is loaded. This feature is documented using the same format as the general documentation for the API interface, for consistency. See Automating Tasks – API for information about how to locate the API documentation.

Input Parameters

Below are the following input parameters for use with the WebstudyCredit API function. These are included automatically when the system generates the Server-Side Completion URL. Note the parameters must be specified as part of the URL (an HTTP GET) and not via an HTTP POST request.

Parameter	Description / Possible Values
experiment_id	The Experiment ID of the study.
credit_token	The credit token used to identify/reference the study.
survey_code	The code that identifies the participant from the external web study.

Error Codes

Below are the possible error messages encountered and their respective descriptions. If the request was successful, there will not be an Error object returned, and only a Result object. See Sample Output for an example.

Error Type	Error Code	Description
Authentication failed	0	unspecified error
Invalid experiment_id	-1	An invalid experiment_id value has been entered
Invalid credit_token	-2	An invalid credit_token value has been entered
Participant already granted credit	-3	The participant has already been granted credit
Participant already marked participated	-4	The participant has already participated
Participant not eligible (no-show)	-5	The participant is not eligible for credit
Invalid survey_code	-6	An invalid survey_code value has been entered

Sample Input

https://yourschool.sonasystems.com/services/SonaAPI.svc/WebstudyCredit?experiment_id=123&credit_token=9185d436e5f94b1581b0918162e8&survey_code=XXXX

Sample Output

The output is in XML format, and an example is below of a successful request. Most of the Result object will contain null/empty values, as it is part of an object used for other API calls. There are two options to check that the credit grant was successful:

1. The Result object exists
2. The Result object exists and the credit_status field has a value of G

If there was an error, then the Errors object will contain data instead of being null.

```
<WebstudyCreditResponse>
	<WebstudyCreditResult>
		<a:Errors i:nil="true"/>
		<a:Result>
			<a:anon_id_code i:nil="true"/>
			<a:credit_status>G</a:credit_status>
			<a:email i:nil="true"/>
			<a:first_name i:nil="true"/>
			<a:last_name i:nil="true"/>
			<a:phone i:nil="true"/>
			<a:signup_id>123</a:signup_id>
			<a:student_id_num i:nil="true"/>
			<a:survey_code>XXXX</a:survey_code>
			<a:user_id i:nil="true"/>
		</a:Result>
	</WebstudyCreditResult>
</WebstudyCreditResponse>
```

Security Considerations

There is one potential risk with using the client-side completion URL. Because the URL is typically accessed directly by the participant (their browser is redirected to it), then they have access to view

the parameters in the URL. The completion URL contains a key specific to your study, as well as an ID (the survey code number) to indicate which participant should be granted credit.

The risk is that a participant could use this URL and start trying other ID (survey code numbers) to grant other participants credit. In order for this scheme to work, *all* of the following must be true:

- They must be able to guess an ID number used by another participant. The ID numbers are not necessarily sequential.
- The other participant must be signed up for this study.
- The other participant must not already have received credit for this study (i.e. they are in Awaiting Action state).

It's fairly unlikely that all three situations will occur, and it's also a lot of work for a participant to guess all possible ID numbers, though this can be automated. If this is a concern, the best option is to use the server-side completion URL, since that is a communication from server to server, and so participants will not see the communication. The drawback is that most commercial survey products do not support use of the server-side completion URL, so additional programming would be required.

Using the SURVEY CODE Feature

Note: If you are just interested in external study credit granting, then this section may not be applicable. This section describes how to use the survey code feature to link a sign-up in the system to data collected in the external study. However, it also describes the foundation for how the survey code feature works, which is useful in better understanding the external study credit grant feature.

For web-based studies which are administered outside the system, there is a special facility available for advanced users to track sign-ups in their web-based study while still preserving confidentiality. This feature applies only to web-based studies administered outside the system.

Before going further, it is important to note that this is an advanced feature and may require some programming skills. Sona Systems is unable to provide technical support for any programming questions.

The way this feature works is that if the text `%SURVEY_CODE%` is placed anywhere within the Study URL field, the system will automatically replace this text with a unique number for the participant. This unique number will also be displayed next to their sign-up within the system, so it's easy to match sign-ups by this number. The number can be anywhere from 4-7 characters in length, and will not contain leading zeroes (1234 is possible, but 01234 is not).

The external study will then need to be set up to process this code and log it appropriately. Sona Systems cannot provide detailed technical support on how to program an external study, as that is code that is external to our software.

Here is an example of how this works. Let's say the study URL is:
`http://www.myschool.edu/mysurvey.html`

If the Study URL is entered in the system as:
`http://www.myschool.edu/mysurvey.html?id=%SURVEY_CODE%`
then when a participant clicks on that URL, the system will replace `%SURVEY_CODE%` with a unique numeric value to identify the participant. For example, the URL may be changed to:
`http://www.myschool.edu/mysurvey.html?id=30039`

If that is the case, then on the page in the system listing sign-ups for this study (i.e., in the timeslot), the code 30039 will appear next to that participant's sign-up.

If this code is parsed and handled by the external study, then the researcher can easily link up the sign-ups in the system with who they have collected data from within their external study, so they know who to credit. Note that the crediting still will not occur automatically. The purpose of this feature is to provide a way to identify participants without compromising privacy, since the system can then be configured so that names are not displayed next to sign-ups.

To help with setting this up, if a participant is not viewing the URL (for example, the researcher is viewing the URL), this special survey code text will simply be removed. Note this special text must be in all capital letters, and surrounded by percent signs. You may confirm it was entered correctly because a sample URL will be displayed when you go to view (not edit) the study, below the normal study website link.

If you provide a SurveyMonkey, Qualtrics, Inquisit, LimeSurvey, SurveyGizmo, or FluidSurveys URL in the Study URL field, then the system will provide guidance (after saving your changes) about how to use the survey code feature.

Online Survey Studies

Introduction

The system includes a rather extensive online survey feature (if enabled on your system). It allows you to set up an online survey as a study within the system, and participants who sign up for the study will be asked to immediately complete the survey. Upon their completion of the survey, they will be granted credit automatically by the system. You may then analyze their survey responses on an individual basis, or download the raw data across all participants who completed the survey, for further analysis. There is a slight chance that you may notice a discrepancy in the number of responses when analyzing a single question compared to downloading the entire set of responses. This can occur if a participant is currently taking the survey, but has not completed it. Their data is included in the single-question analysis (when available) but not in the full download of responses, as there is not a full set of data for an in-progress participant. The system will prevent participants from completing the survey more than once, so there is no risk of duplicate entries for the same participant.

To comply with research ethics guidelines, the participant is given the opportunity to withdraw from the survey at any time. See Participant Withdrawal from a Survey for more information.

There is a space to provide closing text for the survey, which is displayed to participants after they successfully complete the survey (after they have saved all their responses and cannot go back). This is an ideal place to include any relevant debriefing information.

The online survey feature is rather complex due to the many features it contains. In addition, your ability to modify the survey after participants have started to take the survey is quite limited. Because of this, you should plan out your survey well in advance, to make sure it is finalized before you make it available to participants. You may find it helpful to plan out the survey on paper before entering it into the system.

A survey may have an unlimited number of sections and an unlimited number of questions per section, though we recommend limiting surveys to fewer than 300 total questions, 15 sections, and 15 questions per section, to reduce participant fatigue and to ensure proper system performance. Participant fatigue can be an issue since they must complete the survey all at once. In addition, you should make participants aware that their session may time out because of inactivity, and usually this means they will be logged out after 15 minutes of inactivity. Inactivity would happen if they load up a section of questions but do not complete and save their responses for that section within that period of time. It is a good idea to structure sections accordingly, especially if a section contains lengthy text or complex questions. The system will warn participants a few minute prior to this inactivity logout, and provide them with the opportunity to extend their session.

Questions may be free-entry (requiring the participant to type in an answer) or multiple-choice (pick only one or pick many from the list of choices). You may also specify that the system computes a participant's results for an entire section, as either a section sum or average score. This computed sum or average can be computed only for numeric, multiple-choice (pick only one) questions in the section. Such a computation is often useful when a participant's aggregate score is more important, such as with a depression battery.

For free-entry questions where the participant is asked to enter a free-form text answer, the size of the entry field (as it is displayed) cannot be resized in terms of dimensions (only by length). Participants may enter up to 255 characters in their response.

Sections can be displayed in a specified order or random order, or a combination of both. Every section may contain introductory text introducing the section, and the survey itself may also have introductory text introducing the survey, as well as closing text that is displayed upon completion of the survey. You may specify that questions within a section are displayed in random order. If you do not specify random ordering for questions in a section, then the questions will be displayed (in each section) in the order they were entered and cannot be reordered later. Multiple choice questions can have their choices displayed in the entered order or random order (this is specified on a per-question basis). Multiple choice question choices can be displayed horizontally (across the page) or vertically (down the page).

It is important to realize that while the survey feature is quite extensive, there are some things it does not support. It cannot do question timings, where the speed of a participant's response (typically in

milliseconds) to each question needs to be measured. It also cannot do branching, where the questions being presented to a participant will vary depending on their answer to other questions within that same survey (an example being asking a question like “Do you smoke cigarettes?” and then presenting a different set of questions based on their response). The reason advanced features like this are not currently supported is that our software is primarily a participant pool software product that happens to have an online survey feature within it. We asked our customers which features in an online survey were most important to them, and those features exist within the product. There are numerous products on the market specifically for doing online surveys (with no subject pool component), which contain more advanced features, and can easily be linked to from the Sona Systems product by setting up your study as an online study conducted outside the system.

Creating or Modifying a Survey

To create a survey, first create an online survey study. After you create it, you will see the option Update Online Survey when you view the study information. You may not create 2-part online survey studies.

It is important to note that while you are making changes to a survey, it is deactivated so participants may not participate in it. When you go to the Finalize Survey option after you have finished your work with the survey, you will have the opportunity to save your changes and make the survey active (available to participants) or inactive (not available to participants). You should always choose the Finalize Survey option when you finish your work with the survey, as the system saves all changes and computes some other important data when you finalize the survey. If you would like to continue work on the survey at a later date, you should still choose the Finalize Survey option to ensure your changes during the current session are properly saved (most likely you would choose to keep the survey inactive in this situation).

General Survey Information

Choose the General Information option (if creating a new survey, this is the first page you will see) to provide some basic information about the survey. The fields are explained below:

Field	**Description**
Introductory Text	Optional, maximum 10,000 characters. Provide a set of text that will be displayed when a participant starts the survey. You may include HTML in this area, but please be sure you know what you are doing. If you would like to add a carriage-return (paragraph break), simply type in “<p>” (without the quotes). When you first create the online survey, the system may automatically insert some basic default text in this area. You may change any of this text as much as you like – the system will not change it back later as long as you save your

	changes. This is a good place to place any text for informed consent purposes. You may view how this text is displayed to participants by saving it, then going to Preview Introductory Text, which is available from the Section List page.
Closing Text	Optional, maximum 7,000 characters. Provide a set of text that will be displayed after a participant completes the survey and saves their responses. This is an ideal place for debriefing information. You may include HTML in this area, but please be sure you know what you are doing. If you would like to add a carriage-return (paragraph break), simply type in “<p>” (without the quotes). You may view how this text is displayed to participants by saving it, then going to Preview Closing Text, which is available from the Section List page.
Display sections in random order?	You may specify a specific ordering for sections, have the system randomize the order for all sections, or specify the order of some sections, and a random order for other sections. If you specify the order for only some sections, you may also specify, for each section, whether it should be displayed before or after the random-ordered sections. The system does not keep track of the random order sections were displayed for each participant.
Mobile Devices Allowed?	If set to Yes, the participants accessing the system using the mobile version (app) on a mobile device like a smartphone or tablet will be allowed to participate. If the survey makes use of images or question and choice layout is very important, then it may be better to set this to No as the layout may be rendered differently on devices, especially smartphones with small screen sizes. For technical reasons, there is no easy way to preview how questions will look on a mobile device except to

	login as a test participant using an actual mobile device.
Participant response review/change	If set to Yes, then participants may review and change their responses just before they complete the online survey. They are given this opportunity after they complete the last section of the survey, and before any closing text is shown. At this point, they can see all their responses and go back to any section to change their responses. Once they complete the online survey, they cannot go back at a later date and change any responses. It may be useful to set this option to No (so that they are not allowed to review or change their responses at the end of the survey) if sections are somehow dependent on one another, such that allowing participants to change their responses may affect the integrity of data collection.

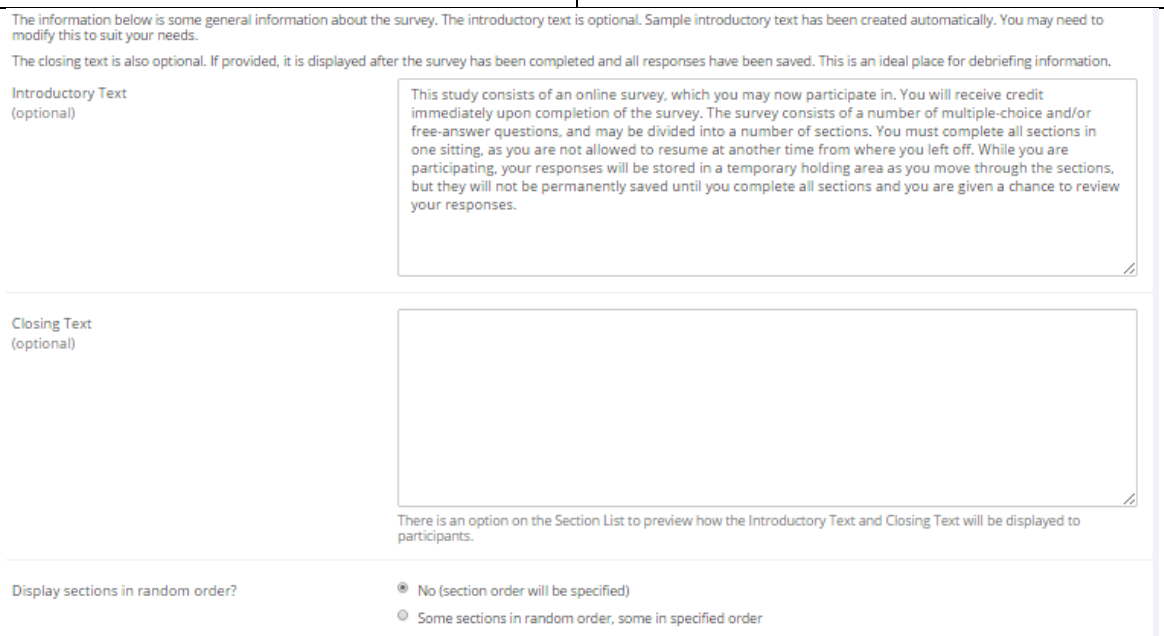

The information below is some general information about the survey. The introductory text is optional. Sample introductory text has been created automatically. You may need to modify this to suit your needs.
The closing text is also optional. If provided, it is displayed after the survey has been completed and all responses have been saved. This is an ideal place for debriefing information.
Introductory Text (optional)
This study consists of an online survey, which you may now participate in. You will receive credit immediately upon completion of the survey. The survey consists of a number of multiple-choice and/or free-answer questions, and may be divided into a number of sections. You must complete all sections in one sitting, as you are not allowed to resume at another time from where you left off. While you are participating, your responses will be stored in a temporary holding area as you move through the sections, but they will not be permanently saved until you complete all sections and you are given a chance to review your responses.
Closing Text (optional)
There is an option on the Section List to preview how the Introductory Text and Closing Text will be displayed to participants.
Display sections in random order?
No (section order will be specified)
Some sections in random order, some in specified order

Figure 20 - Survey General Information

Section List

Depending on if you are adding or editing the survey, you will be taken to the list of sections for the survey. Here, you can change the order that sections will be displayed (if you have not enabled full random section ordering for the survey), and see a quick review of each question. From here, you can

add a question to any section and edit any question. To add a new section, choose the Add a New Section choice at the bottom of the page.

If you have enabled partial random section ordering, then you can specify a section order for the sections you would like to be displayed in a specified order. For the sections you would like to be displayed in random order, leave the Section Order item blank. When you specify a section order, use each number once, and use the numbers 1-98 if you would like the section to be displayed *before* the random-ordered sections, and the numbers 100-199 if you would like the section to be displayed *after* the random-ordered sections. Be sure to use each number only once, or leave the number blank to make the section part of the random-ordered section. Sometimes it is useful to use partial random ordering if you want to ask basic (e.g. demographic) information in the first few sections, while asking more analytical questions in the random-ordered sections. Likewise, you may want to ask about the previous random-ordered sections after they are completed. It is not possible to intersperse ordered sections within the set of random sections, like having 2 ordered sections, then 3 random sections, the 1 ordered section, then 2 random sections, etc. The random sections are treated as an entire block of sections, and other sections cannot be placed at specific places within that block.

There is also a Preview Section option so you may preview the survey as participants will see it.

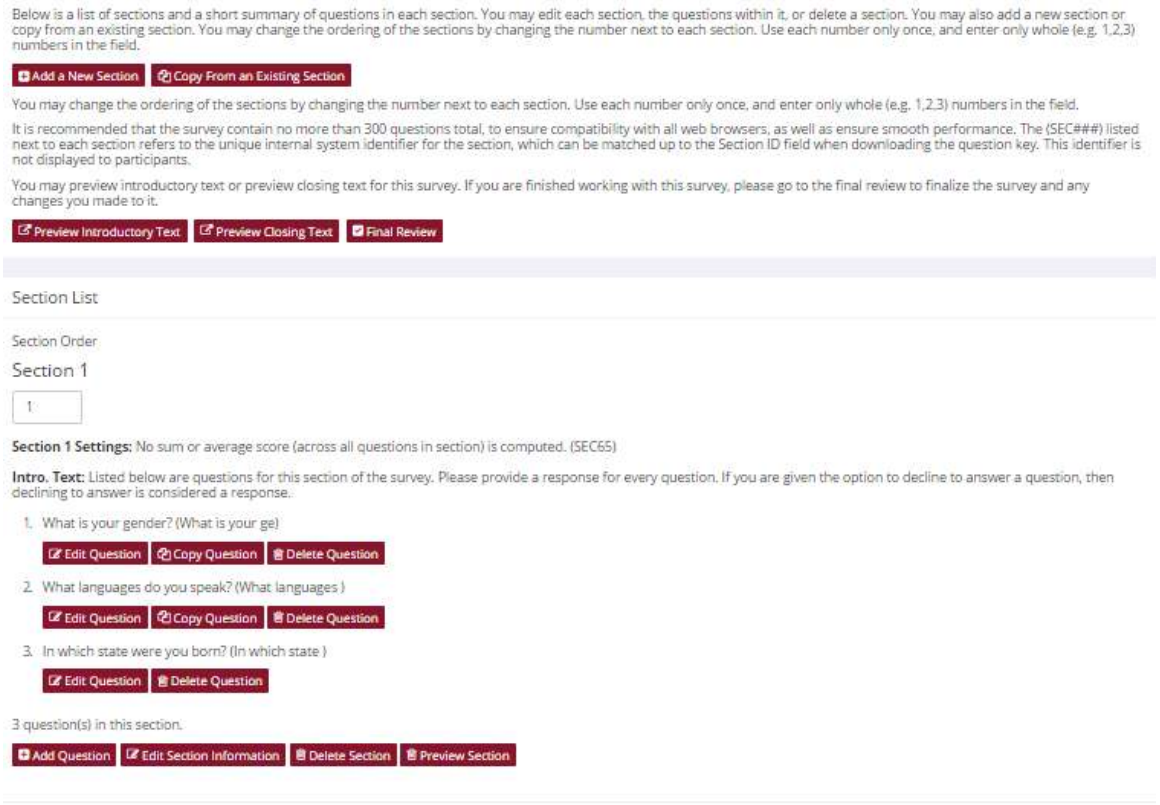

Below is a list of sections and a short summary of questions in each section. You may edit each section, the questions within it, or delete a section. You may also add a new section or copy from an existing section. You may change the ordering of the sections by changing the number next to each section. Use each number only once, and enter only whole (e.g. 1,2,3) numbers in the field.
Add a New Section
Copy From an Existing Section
You may change the ordering of the sections by changing the number next to each section. Use each number only once, and enter only whole (e.g. 1,2,3) numbers in the field.
It is recommended that the survey contain no more than 300 questions total, to ensure compatibility with all web browsers, as well as ensure smooth performance. The (SEC###) listed next to each section refers to the unique internal system identifier for the section, which can be matched up to the Section ID field when downloading the question key. This identifier is not displayed to participants.
You may preview introductory text or preview closing text for this survey. If you are finished working with this survey, please go to the final review to finalize the survey and any changes you made to it.
Preview Introductory Text
Preview Closing Text
Final Review
Section List
Section Order
Section 1
1
Section 1 Settings: No sum or average score (across all questions in section) is computed. (SEC65)
Intro. Text: Listed below are questions for this section of the survey. Please provide a response for every question. If you are given the option to decline to answer a question, then declining to answer is considered a response.
1. What is your gender? (What is your ge)
Edit Question
Copy Question
Delete Question
2. What languages do you speak? (What languages)
Edit Question
Copy Question
Delete Question
3. In which state were you born? (In which state)
Edit Question
Delete Question
3 question(s) in this section.
Add Question
Edit Section Information
Delete Section
Preview Section

Figure 21 - Survey Section List

Adding or Modifying a Section

To add a new section, choose the Add New Section link at the bottom of the Section List page. To modify an existing section, choose the Edit Section Information link next to the section you would like to modify, from the Section List page.

There are three pieces of information you may provide for each section. First, you may specify some introductory text to be displayed at the beginning of the section. When participants take the survey, they view one section at a time, and all the questions in that section. The introductory text may be helpful in explaining the purpose or topic of the questions in that section. You may include HTML in this area, but please be sure you know what you are doing. If you would like to add a carriage-return (paragraph break), simply type in "<p>" (without the quotes). The introductory text is limited to 15,000 characters.

You may choose if the questions for that section are displayed in random order or the order in which they are entered.

You may also choose to have the system compute a section sum or average (for each participant) for the section. These scores are computed only for all the multiple-choice, numeric questions in a section, where only one choice may be chosen. Think carefully about setting this value, because you are very limited in your ability to change it after participants have started to take the survey.

Computed section sums or means are often useful when all the questions are using a unidimensional scale (1-5, for example), but a participant's average score response to the section is more useful to account for their outlier responses.

Depending on if you are editing or adding a section, after you save your changes, you will be taken to a page to add a new question or to the section list.

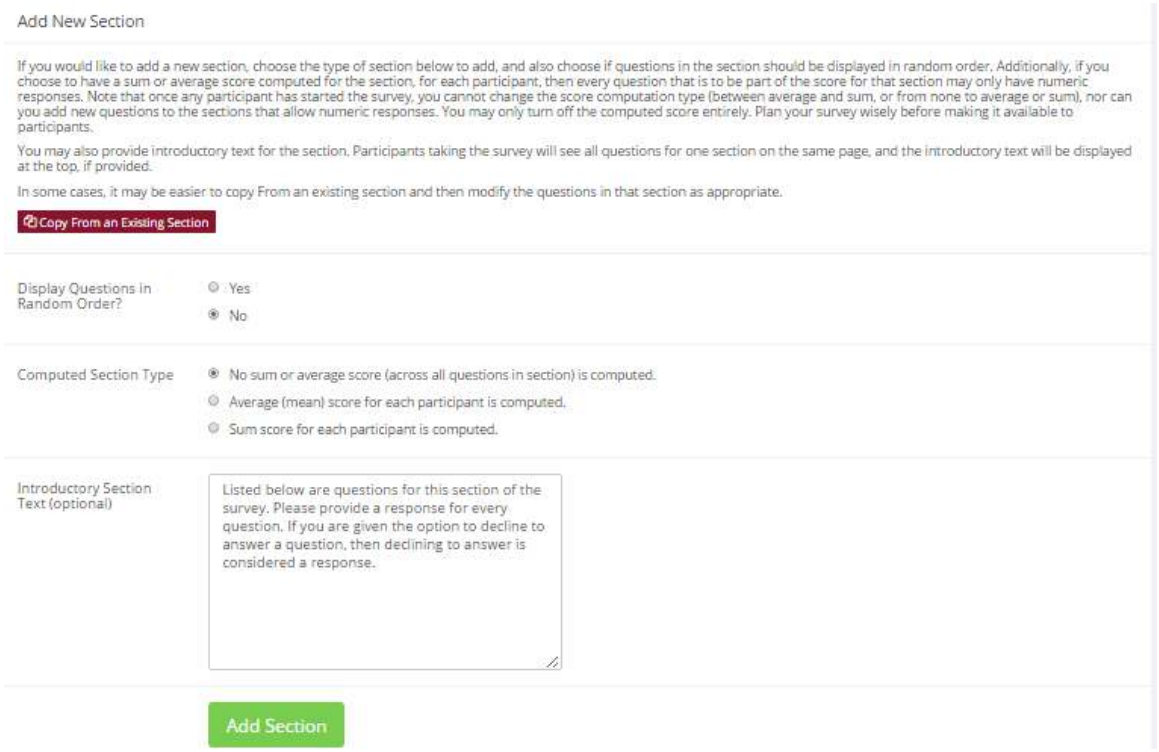

Add New Section
If you would like to add a new section, choose the type of section below to add, and also choose if questions in the section should be displayed in random order. Additionally, if you choose to have a sum or average score computed for the section, for each participant, then every question that is to be part of the score for that section may only have numeric responses. Note that once any participant has started the survey, you cannot change the score computation type (between average and sum, or from none to average or sum), nor can you add new questions to the sections that allow numeric responses. You may only turn off the computed score entirely. Plan your survey wisely before making it available to participants.
You may also provide introductory text for the section. Participants taking the survey will see all questions for one section on the same page, and the introductory text will be displayed at the top, if provided.
In some cases, it may be easier to copy From an existing section and then modify the questions in that section as appropriate.
Copy From an Existing Section
Display Questions in Random Order?
Yes
No
Computed Section Type
No sum or average score (across all questions in section) is computed.
Average (mean) score for each participant is computed.
Sum score for each participant is computed.
Introductory Section Text (optional)
Listed below are questions for this section of the survey. Please provide a response for every question. If you are given the option to decline to answer a question, then declining to answer is considered a response.
Add Section

Figure 22 - Add New Section

Adding or Editing a Question

To add or edit a question, choose the appropriate choice from the Section List, next to the desired section. Questions will be displayed in the order they are added to a section, or in a random order, depending on the section settings. Questions cannot be reordered after they are added, so this should be planned carefully. Depending on the state of the section and if participants have taken the survey, some options will be automatically set for you, and not changeable. All fields must be filled out.

Field	Description
Question Text	The text for the question. This will be displayed above each question's choices. Maximum 15,000 characters.
Abbreviated Question Name	A 15-character label for the question. This is not displayed to participants and is used to name the columns that appear when the data is exported in CSV format. Many statistical analysis programs limit column names to 15 characters.
Question Type	Multiple Choice (select one), Multiple Choice (select many) or Free Entry. If the section has a computed

	average or sum, you may be limited in your ability to add Multiple Choice (select one) non-numeric questions. Free entry choices may contain a response up to 255 characters in length.
Display length of Free-Entry field	Specifies the length (size) of a free-entry field when it is displayed. Acceptable values for this setting are 5-85, and the field will always allow participants to type in up to 255 characters. The height of the field cannot be adjusted, and this setting only applies to Free Entry questions.
Display choices in random order?	If set to Yes, the choices for this question will be displayed to participants in a random order. This option only applies to multiple choice questions.
How should the choices be displayed?	Horizontal (across the page) or vertical (down the page) are the two options for how the choices for a multiple-choice question should be displayed. Often, the horizontal display is effective when the question involves a scale. This setting applies only to multiple-choice questions.
Can participants decline to provide an answer for this question?	If set to Yes, participants will see a choice below this question that allows them to opt out of answering the question. If set to No, they must answer the question. The default when adding a new question (not copying an existing question or section) is set to Yes for ethical compliance.
Are all choices numeric?	If set to Yes, all choices must be numeric whole numbers (e.g. 1, -2, 10). This only applies to multiple choice questions. Sections with a computed section sum or average may not contain non-numeric multiple choice (select many) questions.
Display numeric value?	If set to No, the numeric value of the choice is not displayed to participants. This only applies to numeric, multiple-choice questions where each choice includes both a numeric value and associated text (e.g. “5 Strongly Agree”). This is useful when running a reverse scale.

If the question is a multiple choice question, you must also fill out the choices section that is part of the same form. A minimum of 1 choice must be provided for the question. Each choice may be up to 255 characters in length. If the question is specified as numeric, you must provide a numeric choice, and that choice must be a whole number (e.g. -5, 1, 0, 349). If you would like to provide descriptive text to accompany each numeric choice, you may do so by typing in the numeric choice and leaving one blank space after it, then typing in the descriptive text, for example: “5 Strongly Agree”. If you provide descriptive text along with the numeric choice, then you have the option of hiding the numeric value from participants, by choosing No to the “Display numeric value?” setting for the question. This is useful in reverse scale or other situations where the numeric value for the choices is not important.

If the choices you specify when adding a question do not conform to the configuration of the question (e.g. specifying a non-numeric choice for a numeric question), the system may change the question configuration to ensure that the choices are then valid.

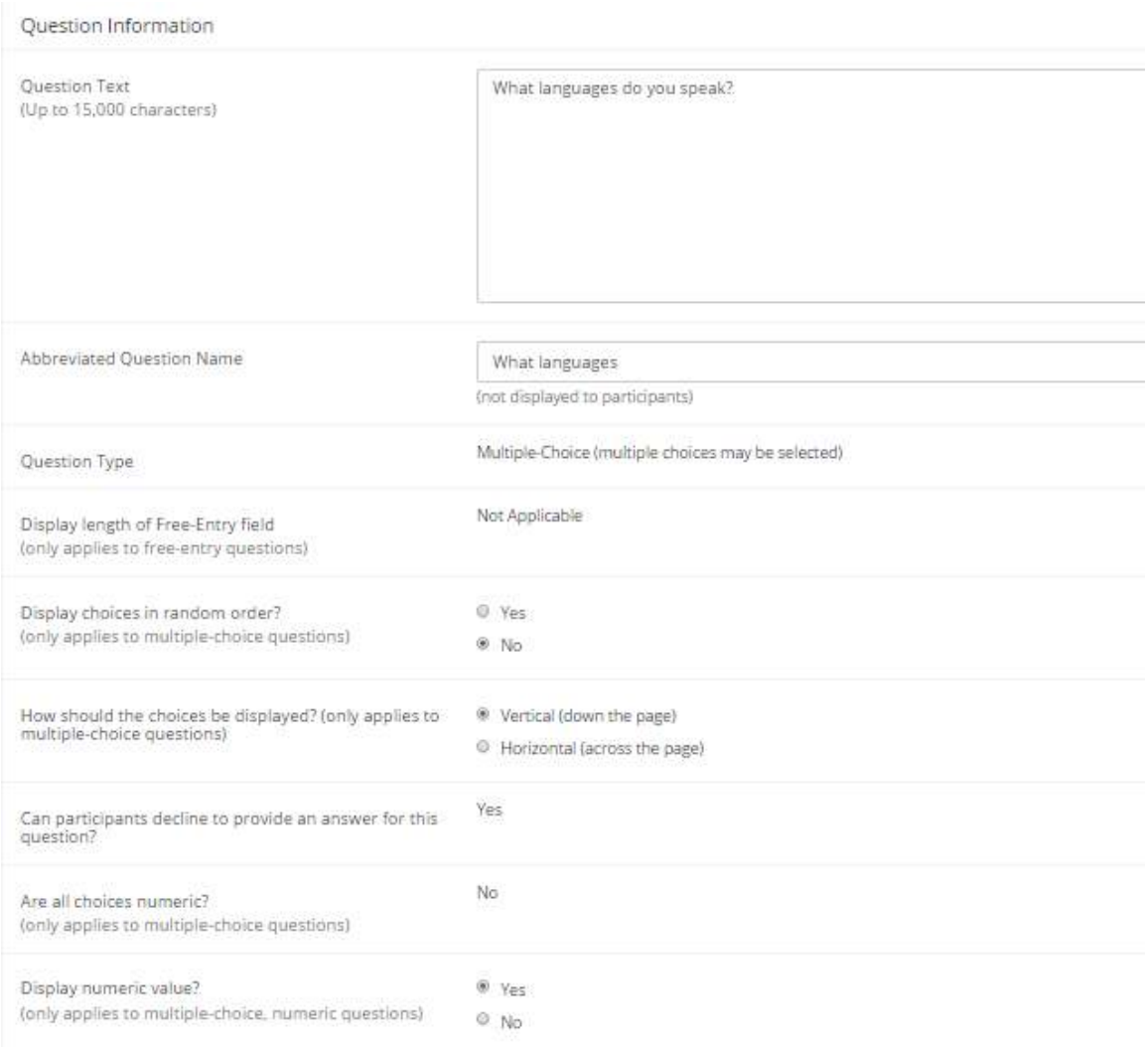


Figure 23 - Edit a Question

Copying a Section

You may copy a section from any of your own surveys into your current survey, by choosing Copy From an Existing Section in the Section List. You will see a list of eligible surveys to copy from. After you choose which survey to copy from, you will see a list of eligible sections in that survey. Once you choose a section, it will be copied into the survey you are currently editing. You may copy only one section at a time, because of the system performance impact when copying sections.

The administrator also has the ability to copy to or from the prescreen, so ask the administrator to do this for you, if you need it done.

Copying a Question

For multiple-choice questions, it is often the case that many questions have the same measures (choices). To make entry of similar questions easier, you may use the Copy Question feature to copy a question. Such an option is only available for multiple choice questions. To copy a question, select the question you would like to copy (when viewing the Section List). You will then be taken to a list of sections where you may copy this question to (the default is set to the section the question came from). After you decide which section you would like to copy the question to, you will be taken to a page where you can make any final changes to the copy of the question before saving it.

Saving Your Changes

When you are done, you should go to the Final Review and save your changes. Even if you plan to do further editing of the survey later, it is **imperative** that you go to the Final Review step, as the system needs to save certain special changes and make some computations. If you do not want participants to participate in the survey yet, you can save changes but keep the survey inactive. When you save your changes, it may take a moment to save all the changes, as the system is performing a number of computations on the survey. Please be patient, as these computations are done to make performance for participants as fast as possible. The system tracks which user last made the survey active or inactive and when they did this, and this is displayed on the setup page.

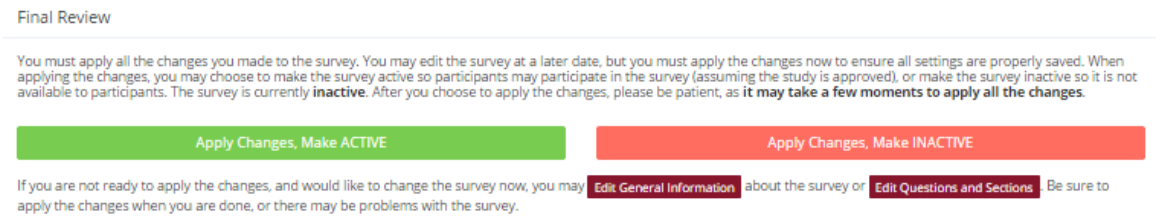

Final Review
You must apply all the changes you made to the survey. You may edit the survey at a later date, but you must apply the changes now to ensure all settings are properly saved. When applying the changes, you may choose to make the survey active so participants may participate in the survey (assuming the study is approved), or make the survey inactive so it is not available to participants. The survey is currently inactive. After you choose to apply the changes, please be patient, as it may take a few moments to apply all the changes.
Apply Changes, Make ACTIVE
Apply Changes, Make INACTIVE
If you are not ready to apply the changes, and would like to change the survey now, you may Edit General Information about the survey or Edit Questions and Sections. Be sure to apply the changes when you are done, or there may be problems with the survey.

Figure 24 - Saving Survey Changes

Viewing a Survey as a Participant

If you would like to see how the survey will be displayed to participants, that can easily be done while setting up the survey. Next to each section (in the section list), there will be a Preview Section link so you can view the section exactly as participants would see it. You may also view how the introductory and closing text will appear to participants, by choosing the Preview Introductory Text and Preview Closing Text options which appear on the Section List page.

Participants will see a basic progress display on the top right corner of each page, listing the section they are on (ordinal counting), and how many sections total are in the survey. When using Preview Section, you will see this progress display as well, except the current section number will appear as "X" in preview mode since it is not an actual participant taking the survey (and randomization of section order may be involved).

If you find it necessary to go through the entire process as a real participant, you can do so by creating a test participant account. Set the online survey study so it has an invitation code, so no other participants can sign up (since they will not know this invitation code). Then, sign up with your test participant account and take the survey. You can remove the invitation code later if necessary.

Participant Withdrawal from a Survey

At any time while participating in the survey, participants have the option to withdraw from the survey. A Withdraw button will appear in the top right corner of each page.

When a participant withdraws, they have the option to withdraw *without* the option to receive credit, or *with* the option to receive credit.

If they choose to withdraw *without* the option to receive credit, all their survey responses as well as the record of their sign-up will be deleted. Participants are told that this option should be used if they want to later participate in the survey. In other words, it would likely be used when a participant starts a survey but realizes they won't have sufficient time be to complete it at the moment, but would like the opportunity to participate later. No notification to researchers is sent in this scenario.

If they choose to withdraw *with* the option to receive credit, then all their survey responses will be deleted, but a record of their sign-up will be kept and it will be in awaiting action state. The researcher will receive an email about the withdrawal, as well as some basic information about how far along the participant was when they chose to withdraw (both in time spent and number of questions completed). This information is provided in case there is a policy of granting credit for early withdrawals based on time spent or percentage completion. Participants also have the option of including a message that will be sent to the researcher to explain their withdrawal, but such a message is not required. The researcher should then grant credit to the participant if necessary, by going to the timeslot and finding that sign-up.

Participants are informed that if they are unsure which of the withdrawal options to choose, that they should choose the withdraw option that retains their ability to receive credit.

The withdrawal option cannot be removed, as it is there to ensure compliance with research ethics guidelines.

Viewing Survey Data Usage and Deleting Survey Data

The system has a limited amount of storage space, and you are expected to download the survey data you have collected on a routine basis, and then delete it from the system. By going to View Survey Data Usage, you can see how much database space is being used. You can then download the survey data (a link is provided), and delete it from the system.

When you delete the data from the system, all survey data collected within the last 5 minutes will *not* be deleted, as a safety feature. This is to ensure you have had adequate time to download the survey data before deleting it (to account for the time between downloading the data and deleting it).

If you choose to delete the survey data in this manner, the record of participant sign-ups *will* be retained, so you can ensure they do not complete the same online survey again.

Deleting a Single Participant's Survey Responses

On rare occasions, you may want to delete a participant's survey responses, usually so they can participate again. To do this, cancel their sign-up and that will delete their responses. Note this will also remove any credit they earned. See Manual Cancellation for more information.

Analyzing Survey Responses

You may analyze a specific survey question on-screen by selecting the survey and choosing the Analyze Survey Responses option. From there, you may choose a specific question and view or download the response data. This will include data from participants who are still in the process of completing the survey, but have not yet completed it. The Download Survey Responses option, which provides the entire set of survey responses for all participants, includes only data from participants who have completed the survey, to ensure easier data analysis.

In rare cases, you may notice that a few responses for certain questions appear (or disappear from) the Analyze Survey Responses while never showing up in Download Survey Responses. What happens in this situation is that a participant started an online survey but never fully completed it or withdrew from it (they probably just closed their web browser). The system goes through all "orphaned" responses in this situation and clears them out once they are more than 2 days old.

More likely, you will want to analyze the survey data across all questions. In this case, you should choose the Download Survey Responses option.

To successfully analyze the data, you will need to download 2 sets of data. The first is the question key, which lists a unique numeric identifier for each question, along with the question text and abbreviated question name. It also includes the section number each question was in. Note the section number listed is merely a unique identifier for each section, and has no correspondence to the order in which sections were presented. Also note that section mean and sum values, if calculated, will normally be at the end of the list of questions. This data is in CSV format, and is available by clicking the Download Question Key link on the Download Survey Responses Page.

After you download the question key, you can download the survey data. The data may be separated into parts, if there is a lot of data to download. The system will adjust the size of each part based on how many questions are in the survey. A survey with a large number of questions will be broken into more parts, with fewer rows of data per part. The default option is to download the entire set of survey data (all parts) at once. If you receive an error when doing so, then download each part one at a time – there may be too much data in the combined download for the system to process.

You may also choose to limit the download based on date range, which is based on when the participant completed the survey. If you choose a date range, this merely filters each existing part of the download, so some parts may be empty if no participants whose responses would normally be included in that part completed the survey during the specified date range.

There are three options for downloading and viewing the data (both the question key and responses):

1. Download as CSV File. This is the most popular option, and allows you to save the data on your computer and load it in your preferred data analysis tool.
2. View On-Screen (CSV Format). This option lets you view the data on-screen instead of downloading it. The data is still displayed in CSV format, and it's a good way to view the format of the data and ensure all the data you expect is there. Often with larger datasets, downloading and viewing the data with some tools (like Excel) may make it appear as if not all the data is there, when in reality it's a limitation of the tool and not a problem with the data download. The on-screen option is also useful if data was collected in a language that uses Unicode character sets, like Hebrew.
3. View On-Screen (Table Format). This option provides an easy way to view the data on-screen (to visually analyze the data) but is not very useful for purposes of loading the data into an analysis tool.

The data is presented as one row per respondent, with each of their responses in a different column. The first row includes the column headings, and the column heading maps to the abbreviated question name. Since there is no facility to specify an abbreviated question name for the computed section sum/mean item, the system automatically assigns a unique name to those columns. The naming convention is SECXXX where XXX maps to the system's internal section identifier for that section (section_id). You can use the question key to determine which question maps to which column. The order of columns (questions) in the data download is not necessarily the same as the order of questions in the survey – it's ordered based on how the data is stored internally in the system. The data also includes the exact time the participant started and completed the online survey. You can use any common data analysis tool to compute how long it took the participant to complete the survey, using this information. There is also a column listing how many minutes it took the participant to complete the survey, rounded to the nearest minute.

There will be an option to include only the numeric response portion of questions that are multiple-choice with numeric choices. This is useful if the numeric question was set up with associated text, but that text should not be included in the analysis file. One example would be where the response selected was "5 Strongly Agree" but only the number 5 (and not the associated text) is useful during analysis. If you choose this option and download data and find that the associated text is included with

the numeric response, then have a closer look at the survey – most likely the question was not actually set up as a numeric question. The easiest way to deal with this downloaded data is to use a data analysis tool to do a search and replace to change the response in your downloaded data into a numeric format. Your IT department can provide assistance with such tools.

If your survey has a lot of questions (and thus columns in the output file), you may have trouble loading the data with some spreadsheet programs, which are not equipped to handle such large datasets. Your best option is to use a full-featured statistical analysis package, like SPSS or SAS. Those packages handle large CSV-format data imports with ease. Your IT department can help you to select the best tools. In particular, Excel has trouble dealing with datasets with more than 250 questions (columns).

Frequently Asked Questions about Online Surveys

Is it possible to have multiple versions of an online survey, with participants being randomly assigned to one version of the survey at the start of the survey?

The best way to do this is to create multiple online surveys (you can easily copy questions between them with the Copy Section Feature, to save time), and use a prescreen participation restriction that is unrelated to your research. For example if there is a prescreen question asking for the last digit of the participant's university ID number (assuming this is randomly distributed), then you can use that to easily break up the pool into random tenths by using that as a prescreen participation restriction for each version of the study.

Is there a way to post images, graphics, or videos in the online survey, so that participants can respond to questions referring to the image or video?

Yes. You will need to have the ability to post images on a webserver (most likely at your school), and know a small bit of HTML. Let's say your graphic is located at
`http://www.yourschool.edu/myimage.gif`

Put this in the place where you want the image to be displayed:
`<IMG SRC="http://www.yourschool.edu/myimage.gif">`

If you're unfamiliar with HTML, you may want to ask someone in your IT department for assistance with this.

You can use a similar process to post videos, but you'll need to ask the person in charge of the webserver where you post the video for the best method (in HTML) for linking to it, as there are a few different methods to link to videos.

You cannot upload images or videos directly onto the Sona Systems server, but every university provides a facility to post content on webservers at the school, and this method is better for

participants also as the data (images and videos are usually quite large) will be stored on the high-speed network within the university.

Can certain sections be presented for a specified period of time (e.g. 60 seconds)?

No. There are technical limitations and inaccuracies in how web browsers interact with web servers, as well as internet latency factors that make this difficult to do, so this feature is not offered.

Can I make an online study a two-part study?

Online studies cannot be two-part studies, and the reason has to do with what two-part studies are intended for. They are used when the researcher needs to ensure a fairly strict separation between each part. For example, in memory research, a researcher may want to set up the two parts exactly 14 days apart.

The issue with online studies is they are not scheduled to take place at a certain date and time, so it's impossible to enforce any kind of strict separation between each part.

If the goal is just a follow-up to a study, then the time separation probably isn't very important. In that case, the best solution is to set up two studies, and set the first study as a pre-requisite for participation in the second study.

Is there a method to upload a survey into the system (from Word, Excel, etc.)?

For online survey studies, there is no method to upload the data. We considered this, but there is no standard format for survey data representation, so there was no format we could really support for uploading.

In the online survey feature, there is the ability to copy questions and sections, which may make it easier to set up the survey if many questions have the same sets of choices, for example.

When a participant is taking an online survey study, when is their sign-up actually recorded in the system?

The system will not record completion (or even sign-up) of an online survey study until it is actually completed (or if the participant chooses to withdraw early). Participants are shown the closing text as the last step of the online survey study -- just after their responses have been saved and their sign-up is recorded.

When they start the online survey study, it is noted to participants that their responses are not fully saved until they complete the study, and only then will they be properly recorded. This is for both technical and IRB reasons.

I have created my online survey and participants cannot see it. I have ensured that all the prescreen restrictions, course restrictions, and pre-requisite/disqualifier restrictions are set correctly. Why is it not showing up?

You need to set up at least one timeslot (and the standard method for an online survey is to set up only one timeslot) for the survey, to specify the participation deadline. If you still have problems, contact the administrator and ask them to run Check Study Configuration on your study, and that will explain why a study is or is not showing up.

My online survey had 5 spaces in a timeslot, and somehow 6 people signed up and received credit. How did this happen?

This is a rare situation that occurs, usually with online surveys that take a long time to complete. What happens is that all 6 people (or at least the last 2 people) started the online survey at around the same time, and before any of them could finish it. The system checks at the point of sign-up to see if there are open spaces for the online survey, but does not consider someone who has started the online survey but not finished it as taking up one of those places (in case that person abandoned early without properly withdrawing). So, in this rare situation, there is no choice but to credit all participants who successfully completed the survey, as it is the only fair outcome for participants. Note that this situation is quite rare, and most likely occurs when the survey is lengthy, and there are many participants vying for a limited number of available timeslots in the system.

Working with Timeslots (Sessions)

Timeslots (also referred to as Sessions) are the available times when a participant may participate in the study. If you are setting up timeslots for a web-based study, please read the section in this documentation on Web-Based (Online) Studies for some special information.

Timeslots allow you to specify a date, time, location, maximum number of participants, and researcher for a session.

Timeslot Usage Restrictions

If enabled on your system, you may find there is a limit to the amount of time available for scheduling timeslots. This usage is computed by adding up all the past timeslots where credit was granted or is in awaiting action status, and then adding all timeslots in the future, regardless of credit status. You may find that the usage goes down over time, as time progresses and timeslots that were in the future which had no sign-ups are now in the past and no longer count towards usage (empty timeslots). The timeslot usage and limit is listed whenever you add a timeslot, if usage restrictions apply. It may also be listed when you view your profile, depending on how your system is configured.

Timeslots Linked to Specific Researchers

If your system is configured to allow multiple researchers per study, you will also have an option to link timeslots to a specific researcher. This is done primarily for organization purposes, and has no effect on who can view and modify the study, or any timeslots for that study.

This feature is useful when there are a number of researchers running a study, and researchers are responsible for running specific timeslots. If a timeslot has a specific researcher linked to it, then only that researcher will be listed as the contact point when a participant receives any emails related to their participation in that timeslot. Finally, only the researcher connected to that timeslot receives related notification emails, such as participant cancellation notification, and reminder emails (assuming such emails are enabled).

It is also possible to have some timeslots where a specific researcher is linked to them, and others where all researchers (who are assigned to the study) are responsible for the timeslot. It is not possible to link more than one, but not all of the researchers (for the study), to a specific timeslot. The options are to either link one researcher to the timeslot, or all of them.

If a researcher is removed from a study, then any timeslots that were linked to them for that study will be changed so all researchers (for the study) are now responsible for those timeslots.

To use this feature, the system must be configured to allow multiple researchers per study. Then, the study itself must be configured to allow researchers to be linked to specific timeslots. Finally, the study must have more than one researcher connected to it.

Creating Timeslots

To add a timeslot for a study, you must first choose the study that you would like to add a timeslot for. To view your studies, choose the My Studies option on the top toolbar. Click on the desired study, and choose the Timeslots choice.

You will see a list of any existing timeslots, and the Add A Timeslot option on the top of the page. Click on Add A Timeslot.

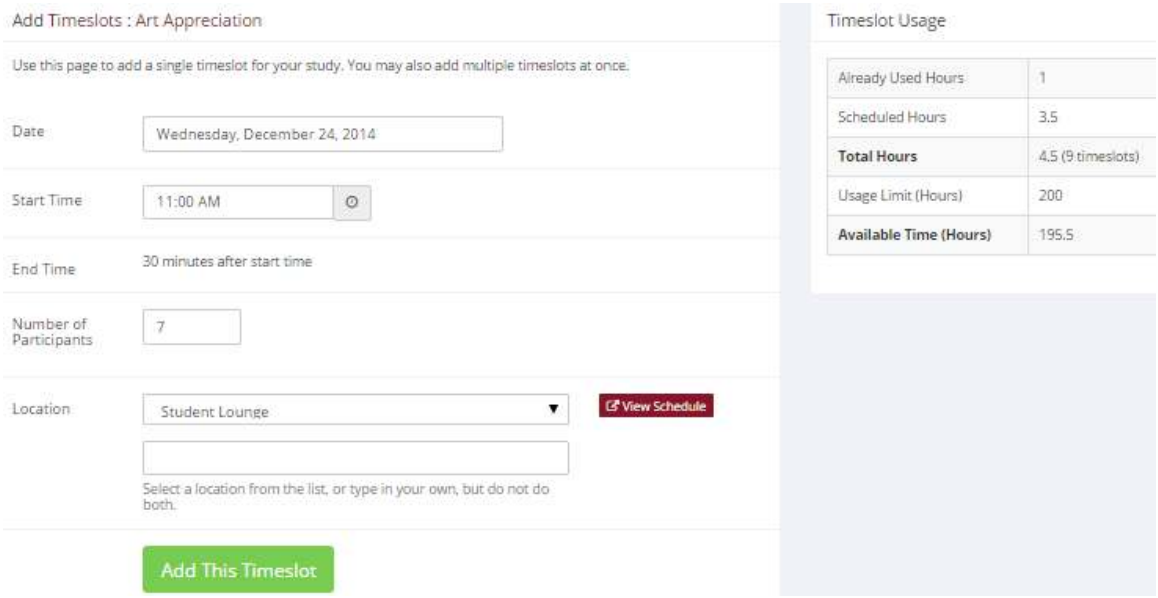


Figure 25 - Adding a Timeslot

The following table lists the information you may enter about a timeslot, along with an explanation. All fields are required.

Field	**Explanation**
Date	The date for the timeslot.
Start Time	The time for the timeslot. A sample time will be provided. If you want to change the time, please use the same format as the time you see presented. Note in particular how “a.m.” and “p.m.” are handled (if such a format is enabled on your system).
End Time	The time when the timeslot will end. This is computed automatically based on the duration you entered when you set up the study.
Number of Participants	The number of participants for this timeslot. This number is *not* visible to participants. They will only see whether the timeslot is full or not. The maximum number is 999.
Location	The physical location where the study will take place, for this timeslot. It will be automatically filled with the location of the previous timeslot, when available, to

	ease in data entry. Depending on how your system is configured, you may see a list of pre-configured locations. You may choose any of those locations and click on View Schedule to see the schedule for a location. The system will automatically prevent you from adding a timeslot using a location that is already in use at the time you try to schedule the timeslot. If you do not see the location in the list that you plan to use, you can simply type in the location in the text field below it. The location field does not apply for web-based studies.
Researcher	The researcher assigned to this specific timeslot. The list will contain a list of all researchers for the study. Choose ALL if all researchers (for the study) should be assigned to this timeslot. See Timeslots Linked to Specific Researchers for more information.

To ease data entry, the system will automatically fill in the date, time, and location based on the ending time of the last timeslot for this study. If applicable, your current timeslot usage will be listed, and you will be prevented from adding a timeslot that would exceed your timeslot usage time limit. A convenient calendar is provided next to the form, and you can click on any date and that date will be transferred to the form.

If you add a timeslot such that there is another timeslot (for any study) that occurs in the same time, at the same location, you will receive a warning (but the addition will be allowed), unless the location was chosen from the pulldown list of locations, in which case the addition will be blocked. If you add a timeslot that will take place outside of normal hours (for example, at 1:00 am), the system will provide a warning but will allow it to be scheduled. You may not schedule a timeslot to occur after the IRB expiration date for your study, if Strict IRB mode is enabled by the administrator. The system allows adding timeslots to a study that is not available to participants (not active or not approved), but it will give a warning because participants are not able to sign up for the timeslot.

If you are running a web-based (online study), you should create a single timeslot with the participation deadline equal to the last day you would like to run the study. For number of participants, specify the maximum number of participants who may participate. If you are running a web-based study and you plan to collect data from more than 999 participants (999 is the maximum allowed in one timeslot), then once that timeslot is close to filling up, create a second timeslot at a slightly different time and/or date as the first timeslot.

Creating Multiple Timeslots

If you would like to add multiple timeslots at once, choose the Add Multiple Timeslots link. You may choose to add a specified number of timeslots, or copy the timeslots from another week to a specified week. If you choose to copy, the system will copy the time, location, and number of participants for the specified week to the desired week, for each day of that week (starting with Monday).

If you choose to create a specified number of timeslots, you can choose the number of timeslots you would like to add, the start time and date, and the amount of time between each timeslot (to allow for breaks). You also may specify that timeslots that would occur outside normal business hours be shifted to the next business day, and specify when business hours occur. The system considers Monday-Friday to be business days.

On the subsequent page, you may change any of it to deal with special cases. Timeslots that you attempt to add, that either have errors or would result in exceeding the timeslot time usage limit, will not be added. This feature is not available for web-based (online) studies, as web-based studies rarely have more than one timeslot.

If you would do not want to add a specific timeslot that is listed, choose No in the Add This Timeslot? column.

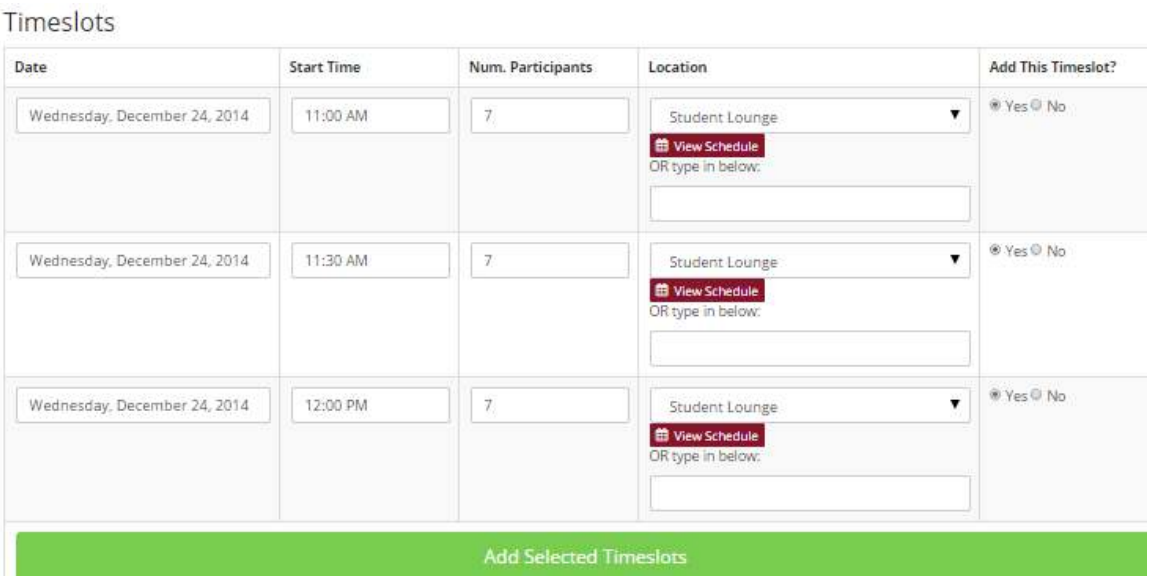


Figure 26 - Creating Multiple Timeslots

Modifying and Deleting Timeslots

To modify or delete a timeslot for a study, you must first choose the study that you would like to deal with. To view your studies, choose the My Studies link from the top toolbar. Choose the Timeslots option in the View column for the desired study. You will see a list of all recent timeslots. Recent timeslots in the past with no participants signed up will not be displayed. To work with timeslots more

than a few days old and to see all timeslots, you will see a link to view all timeslots for the study. Select the timeslot you would like to deal with, and click the Modify button.

If the timeslot has no participants signed up for it, you will see a Delete button. You may not delete a timeslot that has participants signed up for it (you need to first cancel all existing signups for the timeslot). If you would like to delete the timeslot, click the Delete button, and you will see a confirmation page. Choose Delete again to delete the timeslot.

If you would like to modify the timeslot, modify the desired information and click the Update button just below the timeslot information. It should be noted that participants will *not* be notified (by email) of any changes you make to the timeslot, so you should contact them if information needs to be passed on to them (a link is provided on the same page to do so). If you change the date or time of the timeslot, you will be warned that this was changed in case the change was unintended. You may not update the size of the timeslot (number of participants) to a value lower than the current number of participants signed up for the timeslot. Generally, researchers only update timeslots with sign-ups to update the location, if it was not available when the timeslot was originally created.

If the study (or researcher) is subject to timeslot time usage restrictions, the system will enforce them and prevent you from making changes that would result in exceeding the timeslot usage limit, for example by increasing the number of participants.

Timeslot Change Tracking

The system automatically tracks certain changes that occur with a timeslot, including information about any time the timeslot's key information (date, time, etc.) is changed, as well as any time a manual sign-up or cancellation is performed (but not a sign-up or cancellation done by the participant). This information is tracked for the last 3 months of changes for each timeslot.

To view this information, choose the Timeslot Modification Log when viewing a timeslot, and you will see this information.

Deleting Multiple Timeslots

If you would like to delete multiple timeslots at once, you may do that as well. Such a feature is only available for timeslots that have no participants signed up. To do so, select the desired study and choose Timeslots. At the top of the Timeslots page, you will see a Delete Multiple Timeslots option. The option may not appear in certain cases where such an option is not available because of a lack of available timeslots to delete.

After going to that page, you will see a list of timeslots eligible for deletion. Choose the timeslots you would like to delete, and choose Delete Selected Timeslots to proceed. If you would like to delete all empty timeslots, there is a Check All option at the bottom of this page that will automatically select all timeslots listed on the page for deletion. Click the Uncheck All button to revert the effect of choosing the Check All option.

The system routinely deletes all empty timeslots more than 3 months old to preserve database space.

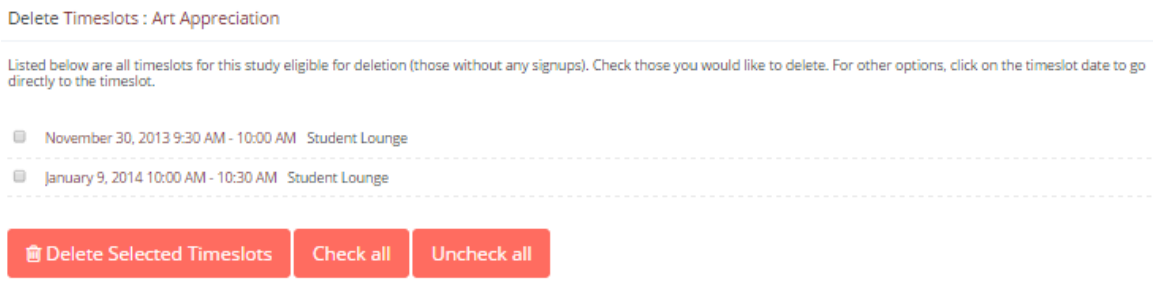

Delete Timeslots : Art Appreciation
Listed below are all timeslots for this study eligible for deletion (those without any signups). Check those you would like to delete. For other options, click on the timeslot date to go directly to the timeslot.
November 30, 2013 9:30 AM - 10:00 AM Student Lounge
January 9, 2014 10:00 AM - 10:30 AM Student Lounge
Delete Selected Timeslots
Check all
Uncheck all

Figure 27 - Delete Multiple Timeslots

Manual Sign-Up

If enabled on your system, you may manually sign up participants for your study on their behalf. There are a number of situations where this is desirable. If the participant happens to show up for a timeslot they were not signed up for, and you elect to let them participate, you can sign them up on the spot for the timeslot. The participant in many cases cannot sign up on their own in this situation, because the sign-up deadline has passed. You may also sign up a participant for a study that has already occurred, if necessary.

Also, a manual sign-up overrides any restrictions you have placed on the study (e.g. pre-requisites), though you will be warned if you are overriding any restrictions. You may not sign up a participant for the same timeslot that they are already signed up for. You are allowed to sign them up for a study even if they are already signed up for a different timeslot for that same study, though you will receive a warning in this case. You may not sign up a participant for a study if it would cause them to exceed their maximum credit limit. If it is necessary to do so, please ask the administrator to do this, as they are allowed to do a manual sign-up even when it will exceed maximum credit earning limits.

You also may not sign up a participant whose account is Limited, if your study is not a research alternative study, as those participants are ineligible for your study (the administrator can still do this).

If the system is configured as such, the participant will receive a confirmation email when you sign them up for a study. In that case, you are also given the option to enter comments to be included in this email that may better explain to the participant why they were signed up. If you are signing up a participant for a timeslot more than one year old, a confirmation will *not* be sent despite the system configuration. This is to make it easier when transitioning from an existing system, as you may sign up old participants for the purposes of preventing them from signing up for the same study again in Sona. You may only sign up participants for your own study.

To sign up a participant for a timeslot, you must first find the desired study and timeslot. To view your studies, choose the My Studies option from the top toolbar. Click on Timeslots for the desired study, then select the timeslot you would like to deal with, and click the Modify button.

At the bottom of the page, you will see a Manual Sign-Up option, if it is enabled. Type in the participant's User ID (you may have to ask them for this) and click Sign Up. If enabled, you may also

choose to sign up a participant using their unique ID code. You may also have the choice to enter their last name and choose from a list of participants. In all cases, after proceeding, you will see a confirmation page that also lists any restrictions on the study. Choose Sign Up to complete the sign-up.

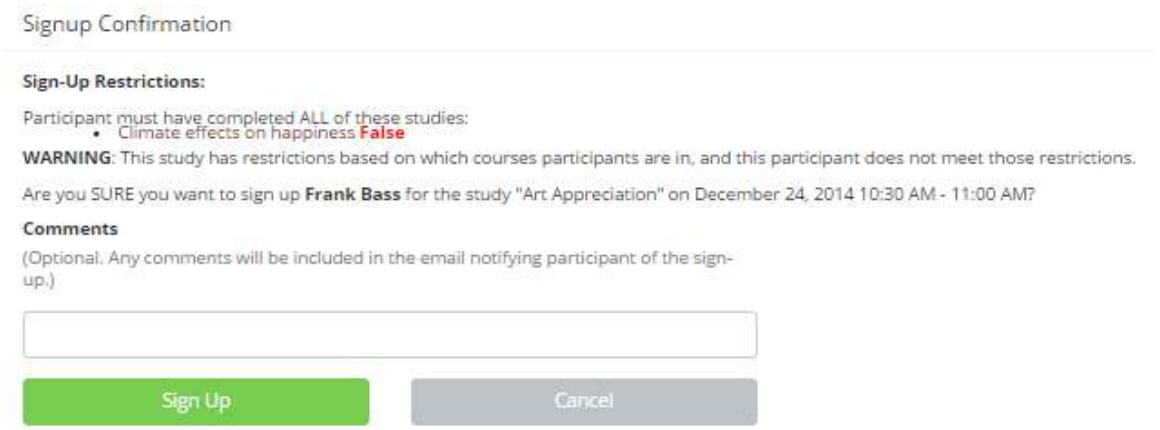

Signup Confirmation
Sign-Up Restrictions:
Participant must have completed ALL of these studies:
Climate effects on happiness False
WARNING: This study has restrictions based on which courses participants are in, and this participant does not meet those restrictions.
Are you SURE you want to sign up Frank Bass for the study "Art Appreciation" on December 24, 2014 10:30 AM - 11:00 AM?
Comments
(Optional. Any comments will be included in the email notifying participant of the sign-up.)
Sign Up
Cancel

Figure 28 - Manual Sign-Up Confirmation

If you are subject to timeslot time usage restrictions, the system will enforce them and prevent you from signing up a participant in the timeslot if that would result in exceeding your timeslot usage limit. If you are doing a manual sign-up for a two-part study, you must do a manual sign-up for each part separately. The system will overlook the scheduling range restrictions as well.

You cannot use the manual sign-up feature for online survey studies, because the sign-up for the study is integrated with the administration of the survey.

The manual sign-up feature will not appear for a researcher if the study requires approval by the administrator and it has not yet been approved. This is to ensure sign-ups cannot occur for a study that has not yet been approved, since research should not take place prior to approval.

Manual Cancellation

If enabled on your system, you may have the opportunity to cancel a participant's sign-up. You may only cancel sign-ups that are in a No Action Taken state. To cancel a sign-up, find the desired timeslot and participant, and click Cancel next to their name. The participant will be sent an email about the cancellation (and who performed it), along with a confirmation code, and their sign-up will be immediately cancelled. The administrator may also receive a copy of this cancellation email, depending on how the system is configured.

You may cancel all participants for the same timeslot at one time, when applicable. The option will appear below the list of signups, in cases where there are two or more participants signed up for the timeslot who are eligible for cancellation (No Action Taken state).

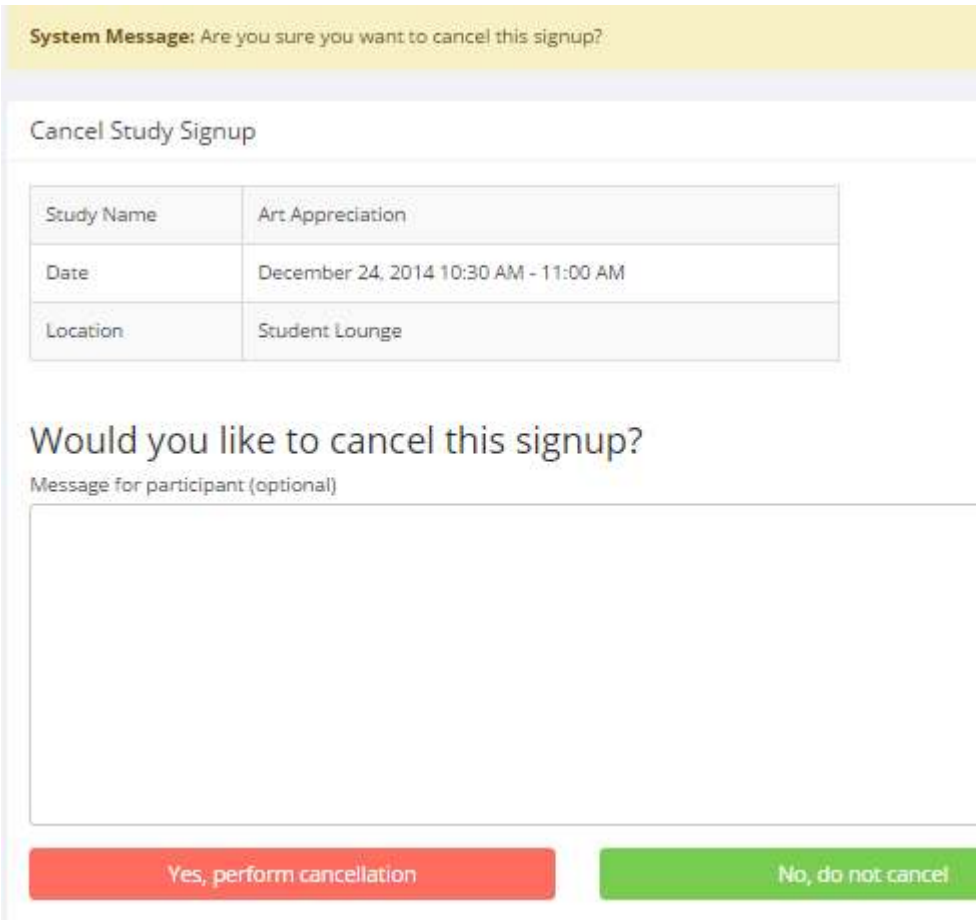

System Message: Are you sure you want to cancel this signup?
Cancel Study Signup
Study Name
Art Appreciation
Date
December 24, 2014 10:30 AM - 11:00 AM
Location
Student Lounge
Would you like to cancel this signup?
Message for participant (optional)
Yes, perform cancellation
No, do not cancel

Figure 29 - Manual Cancellation

Viewing the Participant List

To view the list of participants who have signed up for your study, you must first select the study and timeslot you wish to see. To view your studies, choose the My Studies option from the top toolbar. Click on the timeslots link in the View column for the desired study, then select the timeslot you would like to see, and click the Modify button.

The list of participants, along with their email addresses, will be listed. If ID codes are enabled, you will only see an ID code and no name or email address for each participant, and the list will be sorted by ID code.

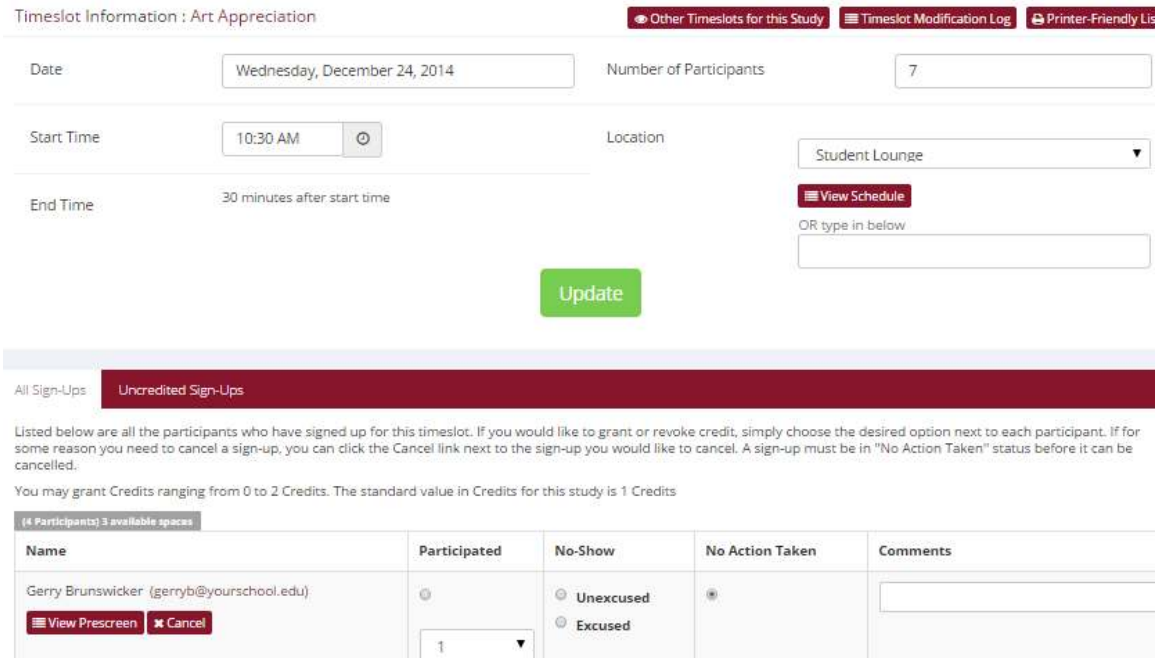

Timeslot Information : Art Appreciation
Other Timeslots for this Study
Timeslot Modification Log
Printer-Friendly Lis
Date
Wednesday, December 24, 2014
Number of Participants
7
Start Time
10:30 AM
Location
Student Lounge
End Time
30 minutes after start time
View Schedule
OR type in below
Update
All Sign-Ups
Uncredited Sign-Ups
Listed below are all the participants who have signed up for this timeslot. If you would like to grant or revoke credit, simply choose the desired option next to each participant. If for some reason you need to cancel a sign-up, you can click the Cancel link next to the sign-up you would like to cancel. A sign-up must be in "No Action Taken" status before it can be cancelled.
You may grant Credits ranging from 0 to 2 Credits. The standard value in Credits for this study is 1 Credits
(4 Participants) 3 available spaces
Name
Participated
No-Show
No Action Taken
Comments
Gerry Brunswicker (gerryb@yourschool.edu)
View Prescreen
Cancel
Unexcused
Excused
1

Figure 30 - Modifying a Timeslot / Participant List

Viewing Prescreen Responses

If online prescreening is enabled on your system, and you are also allowed to view an individual participant's prescreen responses, then you will see a Prescreen link next to each participant's name (or ID code) when you view the information for a timeslot. Click on that link to view the participant's prescreen responses.

If you would like to download the prescreen data for all participants in your study, choose the Download Prescreen Responses option after clicking on your study (in the Study Menu). That will allow you to download all the data at once, in CSV (comma-separated) format, for further analysis. The download will not contain data for participants marked as a no-show.

If you would like to analyze responses in aggregate (across all participants in the system), see Analyzing Prescreen Responses in this documentation.

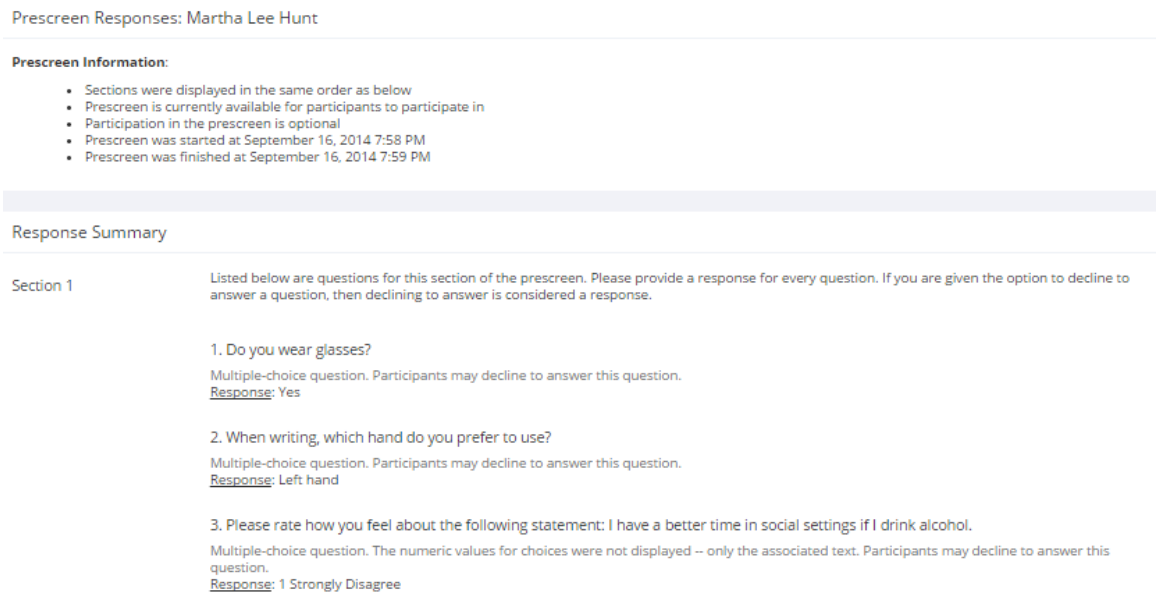

Prescreen Responses: Martha Lee Hunt
Prescreen Information:
Sections were displayed in the same order as below
Prescreen is currently available for participants to participate in
Participation in the prescreen is optional
Prescreen was started at September 16, 2014 7:58 PM
Prescreen was finished at September 16, 2014 7:59 PM
Response Summary
Section 1
Listed below are questions for this section of the prescreen. Please provide a response for every question. If you are given the option to decline to answer a question, then declining to answer is considered a response.
1. Do you wear glasses?
Multiple-choice question. Participants may decline to answer this question.
Response: Yes
2. When writing, which hand do you prefer to use?
Multiple-choice question. Participants may decline to answer this question.
Response: Left hand
3. Please rate how you feel about the following statement: I have a better time in social settings if I drink alcohol.
Multiple-choice question. The numeric values for choices were not displayed -- only the associated text. Participants may decline to answer this question.
Response: 1 Strongly Disagree

Figure 31 - Viewing Participant Prescreen Responses

Granting or Revoking Credit

At the completion of a session, you should promptly mark the attendance status of participants in the system, to ensure proper credit grants. The reason for the prompt handling of this situation is in the event your study is a pre-requisite for another study, and a few other situations. You do not want to hold up other studies that are waiting on your response to the study you just ran.

To grant or revoke credit for a timeslot, you must first find the desired study and timeslot. To view your studies, choose the My Studies option from the top toolbar. Click on the Timeslots link in the View column for the desired study, then select the timeslot you would like to see, and click the Modify button.

You will see a list of participants, identified either by name or ID code. If the participant properly participated in the study, click the radio button next to their name in the Participated column.

If the participant did not appear for the timeslot, you may choose to mark their no-show as excused or unexcused. Depending on how your system is configured, an unexcused no-show may result in a penalty being assessed for the participant (the system will compute this automatically), or their privileges to use the system may be restricted. You should ask your administrator for guidelines about when to grant an excused no-show or an unexcused no-show. Generally, excused no-shows are granted for extenuating circumstances, like if the participant was involved in a car accident on their way to the appointment. An unexcused no-show is generally used when the participant did not show up and had no reasonable excuse. For most schools, the majority of no-shows are unexcused and are due to carelessness on the part of participants.

Depending on how your system is configured, you may see an option to grant a credit value that is different from the standard credit grant. This is useful when you want to grant a participant a lower

credit value because they left the study early (if they deserve a lower credit grant), or a higher credit value if the study ran longer than expected. The default value that is selected is the study's standard credit value. If this is enabled, then you may also grant 0 credits. This is useful if you do not want to grant credits to the participant, but you also want to prevent them from participating in the study again. If a participant is granted 0 credits, and the study is set to prevent duplicate sign-ups, then the participant will not be able to sign up for that study again.

If desired, enter any comments about the session in the Comments section (generally, this is used to indicate the reason for denying credit). Participants will see anything you enter in the Comments section for their sign-up, and these comments will be included in the email sent to participants when a credit grant/revocation occurs, if notification emails are enabled on your system.

Click on the Update Sign-Ups button at the bottom of the list of sign-ups to save your changes. Credit will be granted or a penalty assessed as necessary. The participant(s) will be emailed about this if the system is configured in such a manner.

It is not recommended to leave any sign-up for a timeslot that has occurred in the "No Action Taken" stage. This is a credit "limbo" and the system will warn you upon your next login that the timeslot has not been dealt with properly. Note that if Manual Cancellation is enabled and you would like to cancel a participant's sign-up, the sign-up must be in No Action Taken state.

Depending on how your system is configured, the system may automatically grant credit to participants for timeslots that are more than an administrator-specified number of hours old, and where the researcher has taken no action. You can always change the automatic credit grant later if it was in error. The automatic credit grant takes place once a day, usually overnight. Your administrator can let you know if such a feature is enabled on your system.

If you need to do a simple credit grant or no-show across many timeslots, see the Uncredited Timeslots section which offers such a feature.

Batch Credit Granting

In some cases, you may wish to automatically sign up and immediately credit a group of participants. This is often useful if you administered a study on an ad-hoc basis, and you want to credit participants after the fact.

To do so, go to the appropriate timeslot (you may want to create a timeslot specifically for this purpose), and click on Modify Timeslot. In the Manual Sign-Up section (if enabled), you will see a Batch Credit Grant link. Click that and you can provide the list of User IDs of users you would like to sign up and credit. Users will be signed up and credited immediately. This feature overrides any sign-up restrictions on the study, just as a normal manual sign-up does.

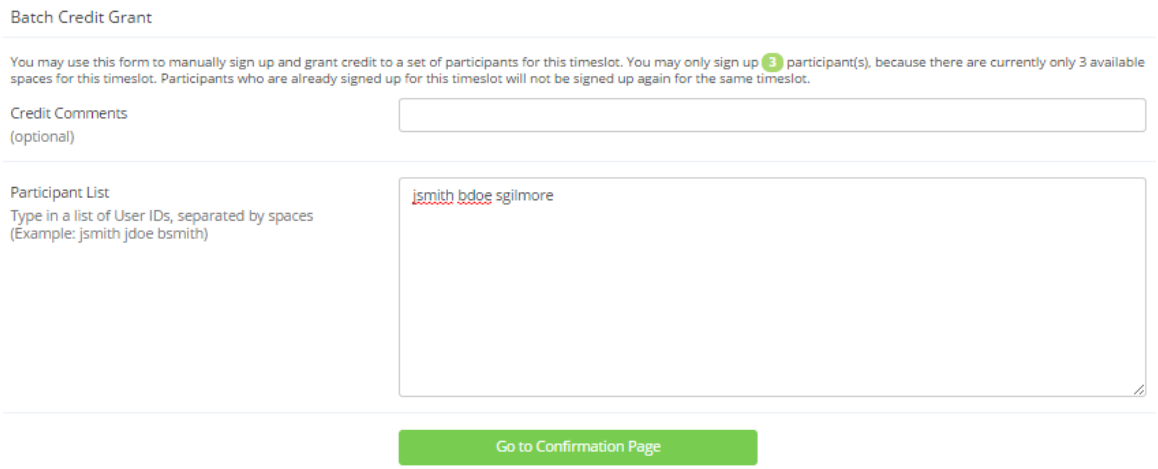

Batch Credit Grant
You may use this form to manually sign up and grant credit to a set of participants for this timeslot. You may only sign up 3 participant(s), because there are currently only 3 available spaces for this timeslot. Participants who are already signed up for this timeslot will not be signed up again for the same timeslot.
Credit Comments
(optional)
Participant List
Type in a list of User IDs, separated by spaces
(Example: jsmith jdoe bsmith)
jsmith bdoe sgilmore
Go to Confirmation Page

Figure 32 - Batch Credit Grant

The batch credit grant feature will not appear for a researcher if the study requires approval by the administrator and it has not yet been approved. This is to ensure sign-ups cannot occur for a study that has not yet been approved. You may provide a list of up to 50 participants, or as many participants as there are available spaces for the timeslot, whichever is less. Any participants listed past that limit will be ignored, but you can run the batch credit again with additional participants.

If you are signing up a participant for a timeslot more than one year old, a sign-up confirmation will *not* be sent despite the system configuration. This is to make it easier when transitioning from an existing system, as you may sign up past participants for the purposes of preventing them from signing up for the same study again in the system.

Emailing Participants

If you wish to contact participants in a particular timeslot for any reason, you may click on the Contact link that will appear next to each participant's name (or ID code) to contact an individual participant. To email the group of participants for a particular timeslot, click the Contact All Participants choice at the bottom of the Modify Timeslot page for that timeslot.

You will be taken to a page where you can fill out a message that the system will send to the selected participants. The message is auto-filled with some basic information about the study, so participants are aware of which study you are referring to. You may remove this information if desired. You may choose to receive a copy of the email that you send.

Depending on how your system is configured, participants may already be receiving a reminder about upcoming studies the day before they are scheduled to participate. Ask your administrator for more information.

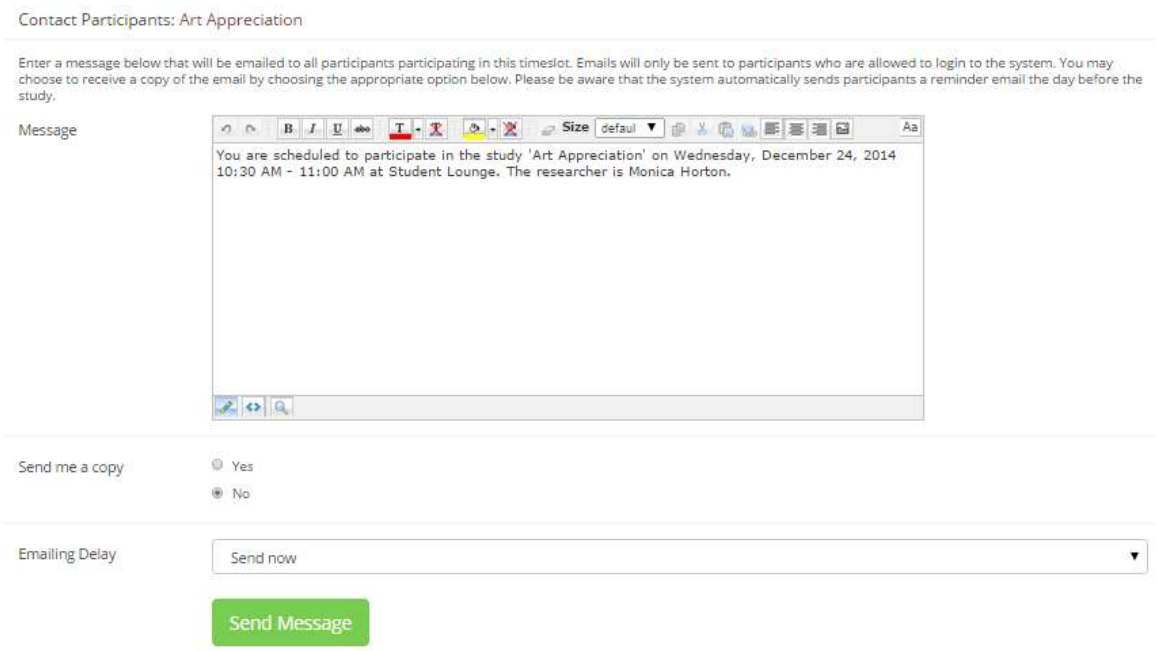

Contact Participants: Art Appreciation
Enter a message below that will be emailed to all participants participating in this timeslot. Emails will only be sent to participants who are allowed to login to the system. You may choose to receive a copy of the email by choosing the appropriate option below. Please be aware that the system automatically sends participants a reminder email the day before the study.
Message
Size
defaul
You are scheduled to participate in the study 'Art Appreciation' on Wednesday, December 24, 2014 10:30 AM - 11:00 AM at Student Lounge. The researcher is Monica Horton.
Send me a copy
Yes
No
Emailing Delay
Send now
Send Message

Figure 33 - Contacting Participants

In some cases, you may find it useful to contact all participants for the study, across all timeslots. This feature may be particularly useful if you are sending debriefing information when a study has concluded. To do so, go to My Studies, click Study Info next to the desired study, and choose the Contact Participants option (in the Study Menu). You will then be able to select which group of participants to send to, and a message to send. Messages will be sent in batches of 3,000 at a time, to avoid overloading email servers. You cannot include attachments in the email, so if you have a document you would like to include, you should post it on another website and provide a link to the document in the email you send.

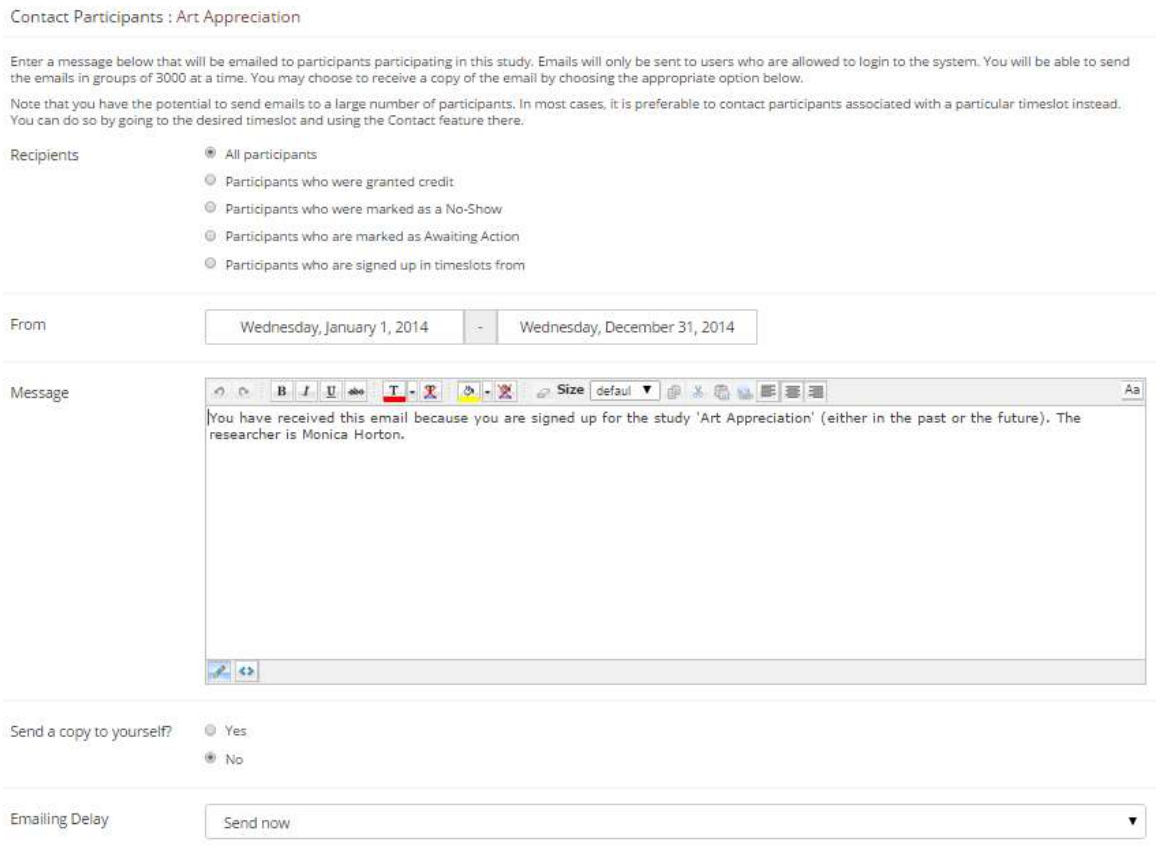

Contact Participants : Art Appreciation
Enter a message below that will be emailed to participants participating in this study. Emails will only be sent to users who are allowed to login to the system. You will be able to send the emails in groups of 3000 at a time. You may choose to receive a copy of the email by choosing the appropriate option below.
Note that you have the potential to send emails to a large number of participants. In most cases, it is preferable to contact participants associated with a particular timeslot instead. You can do so by going to the desired timeslot and using the Contact feature there.
Recipients
All participants
Participants who were granted credit
Participants who were marked as a No-Show
Participants who are marked as Awaiting Action
Participants who are signed up in timeslots from
From
Wednesday, January 1, 2014
-
Wednesday, December 31, 2014
Message
Size
defaul
You have received this email because you are signed up for the study 'Art Appreciation' (either in the past or the future). The researcher is Monica Horton.
Send a copy to yourself?
Yes
No
Emailing Delay
Send now

Figure 34 - Contact Participants

The From (sender) address on the email will be the administrator email address, which is done to prevent the email from being blocked by junk email filters. The “Reply To” address of the email will be that of the user who is actually sending the email, so when a user chooses to reply to the email, the reply will be sent to that (the reply to) address.

There is also the option to restrict the emails so they only go to participants who signed up for timeslots in a specified date range. The date range is based on the date of the timeslot, not when the participant signed up for, completed, or received credit for the study.

Finally, there is an option to specify a delay in sending the email, based on the number of hours from when the emailing option is used. This is useful if you want to target a certain time of day (e.g., during the evenings) when the email will be sent. The emails are generated at the time you use the emailing facility, but are stored on the email server queue until the specified sending time. These emails cannot be revoked once this emailing facility is used.

In most cases, summary information about the email you sent, and in particular to how many recipients it was sent to, will be logged and made available to the administrator. This is done to ensure there is no abuse of the email facility in the system, in compliance with generally accepted Internet practices for sending emails.

Viewing Uncredited Timeslots

When you login to the system, you will receive a warning if you have any timeslots that are more than two days old that haven't been dealt with. You may view a list of all timeslots that have not been dealt with by choosing the View Uncredited Timeslots option from the My Studies page. The default view will show in-person studies with timeslots in the past, as well as all uncredited timeslots for online studies. Timeslots for online studies, including those in the future, are always considered in need of a response. See the Web-Based (Online) Studies section of this documentation for more information.

If you would like to do a simple credit grant (standard credit grant, no comments) or no-show (of either type), you may do so directly from this page. Select the desired sign-ups/timeslots, and then choose the desired option.

If you need to do something more complex, like add comments, or perform a special credit grant with a non-standard credit amount, you can easily click on the timeslot's date and time, and go directly to that timeslot.

In cases where a study has timeslots linked to specific researchers, you will see the warning only for timeslots that are specifically linked to you, or to everyone in the study (i.e., not timeslots linked to someone else in the study). However, when you view uncredited timeslots, you will see all uncredited timeslots for your studies, even if someone else is linked to one of the timeslots for your study. This is done to make it easier to give your fellow researchers (for your studies) assistance in dealing with uncredited timeslots.

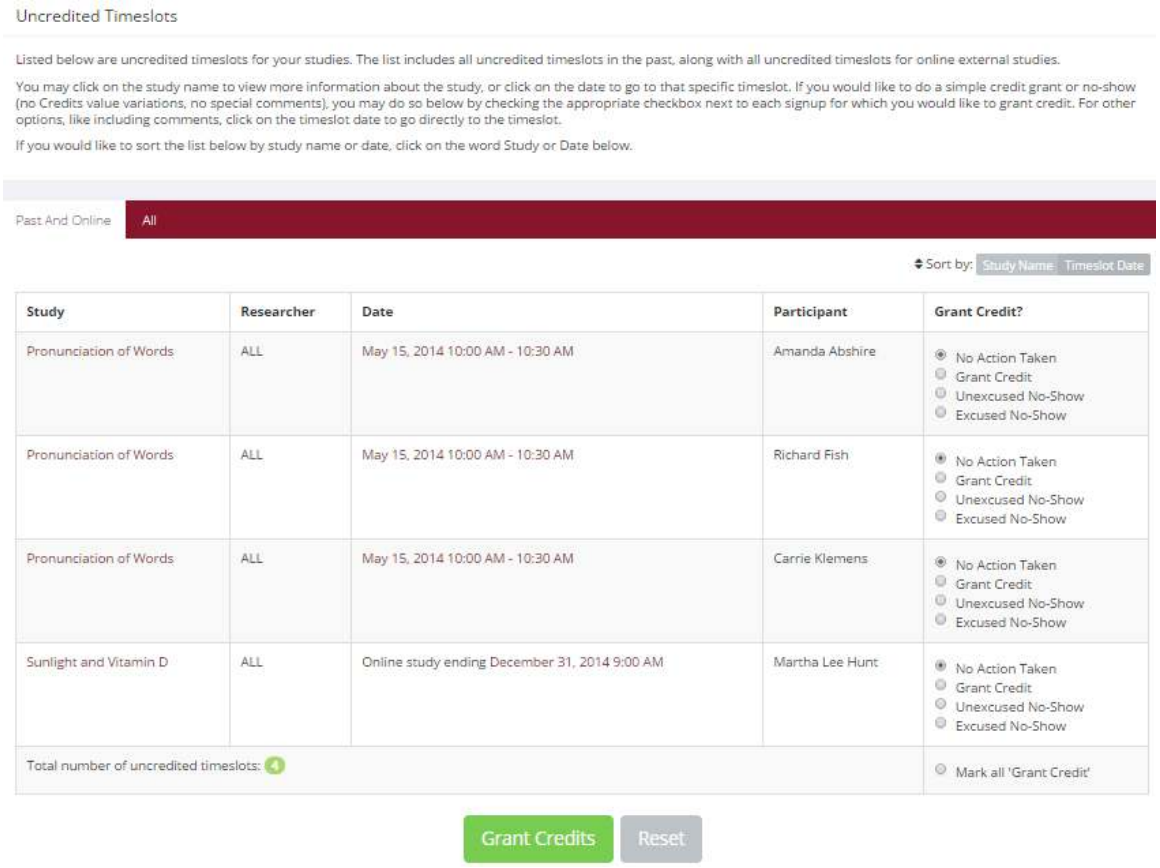

Uncredited Timeslots
Listed below are uncredited timeslots for your studies. The list includes all uncredited timeslots in the past, along with all uncredited timeslots for online external studies.
You may click on the study name to view more information about the study, or click on the date to go to that specific timeslot. If you would like to do a simple credit grant or no-show (no Credits value variations, no special comments), you may do so below by checking the appropriate checkbox next to each signup for which you would like to grant credit. For other options, like including comments, click on the timeslot date to go directly to the timeslot.
If you would like to sort the list below by study name or date, click on the word Study or Date below.
Past And Online
All
Sort by: Study Name Timeslot Date
Study
Researcher
Date
Participant
Grant Credit?
Pronunciation of Words
ALL
May 15, 2014 10:00 AM - 10:30 AM
Amanda Abshire
No Action Taken
Grant Credit
Unexcused No-Show
Excused No-Show
Pronunciation of Words
ALL
May 15, 2014 10:00 AM - 10:30 AM
Richard Fish
No Action Taken
Grant Credit
Unexcused No-Show
Excused No-Show
Pronunciation of Words
ALL
May 15, 2014 10:00 AM - 10:30 AM
Carrie Klemens
No Action Taken
Grant Credit
Unexcused No-Show
Excused No-Show
Sunlight and Vitamin D
ALL
Online study ending December 31, 2014 9:00 AM
Martha Lee Hunt
No Action Taken
Grant Credit
Unexcused No-Show
Excused No-Show
Total number of uncredited timeslots: 4
Mark all 'Grant Credit'
Grant Credits
Reset

Figure 35 - Uncredited Timeslots

Analyzing Prescreen Responses

If online prescreening is enabled on your system, then you might also have the opportunity to analyze prescreen responses in aggregate or as raw data. Choose the Prescreen Results option from the top menu bar. You can then select which question you would like to analyze, and whether you would like to see summary data or raw data (in CSV format) for the selected question. The raw data will identify each participant only by a unique ID code, not by their name, for privacy reasons. If for some reason you need the participants' real names, ask the Administrator to run the same analysis, as they can also pull the real names with their report. This gives you access to all prescreen data across all participants in the system.

If you would like to analyze the prescreen data for just those who participated in your study, select the Download Prescreen Responses after clicking on your study. See Viewing Prescreen Responses in this documentation for further information.

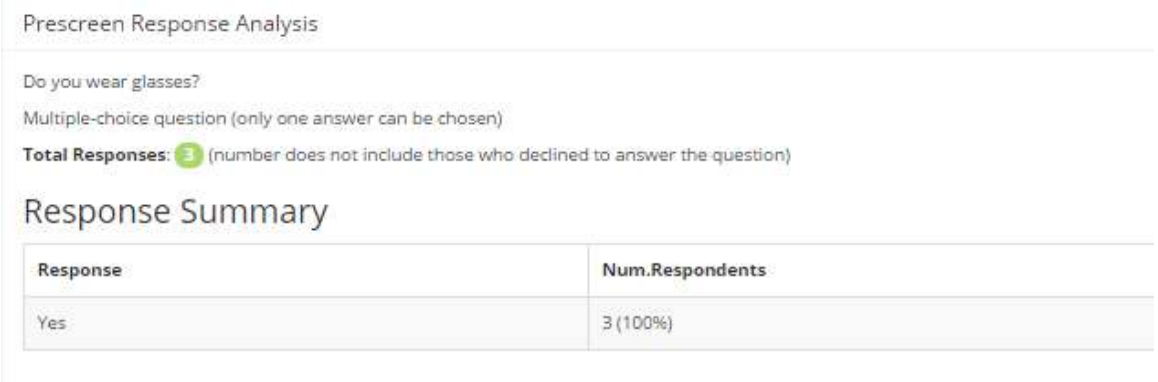

Prescreen Response Analysis
Do you wear glasses?
Multiple-choice question (only one answer can be chosen)
Total Responses: 3 (number does not include those who declined to answer the question)
Response Summary
Response
Num.Respondents
Yes
3 (100%)

Figure 36 - Prescreen Response Analysis

Prescreen Qualification Analysis

If you would like to get an idea of how many participants meet a set of requirements (for help in setting prescreen restrictions on your study), use the Prescreen Qualification Analysis link from the Prescreen Responses page. Using this feature, you can select multiple questions (only questions that qualify for study participation restrictions are listed), and then the desired responses for those questions, and you will see how many participants meet that criteria.

If enabled, you may also contact participants and invite them to participate in any of your studies. See the Invite Qualified Participants to a Study section in this documentation for more information on how this works. The functionality is the same as the functionality described in that section, though a few options may be unavailable when not inviting directly from a study, because those options do not apply. Be sure to include information about how to sign up for the study in your communication to them, as a direct link to the study is not provided in the email.

Frequently Asked Questions (FAQ)

Why do I have to acknowledge the Human Subjects Policy?

Certain regulations and research guidelines either require or recommend it. You only need to do it once every 6 months, so it should not be too intrusive. You will not be asked to acknowledge the policy if this feature is disabled by your administrator.

I want to set up a study so that participants can choose to receive credit or payment. How do I set this up?

Set it up as a study for credit, and note in the study description that participants may opt to receive payment instead, and they should notify the researcher of this when they come to their appointment. If the participant at that time chooses to receive monetary compensation, the researcher should grant credit, but mark the credit as 0 credits (Variable Credit Granting must be enabled in System Settings by the administrator), and then note in the comments for the timeslot that payment was received.

The monetary compensation a participant receives for a study depends on decisions they make during the study. How do I indicate this?

You may type any value into the payment field when setting up the study, so you could type in a range of compensation values.

I want a participant to participate in an upcoming session, but the system says it is too late for them to sign up. What do I do?

If enabled, you can perform a manual sign-up. See the Manual Sign-Up section of this documentation. If not enabled, your administrator can still perform a manual sign-up.

Where are email notifications to me sent?

Email notifications (e.g. sign-up notices) are sent to either an address derived from your user ID or your alternate email address. See the Email Address Options section of this documentation for more information.

How do I deal with dyads?

A dyad is a study which requires a pair of people to participate, but often the second participant is not a "real" participant, but rather a colleague of the researcher who is "colluding" with the researcher as part of the study itself.

You do not need to deal with dyads in the system itself. Participants cannot see how many people have signed up for a timeslot, nor how many spaces are available for a timeslot. So, your "fake" participant can just act like a real participant and the real participant will be unaware of this.

I have finished running my study. What should I do?

So it does not clutter the list of studies for participants, you should make the study Inactive or delete it. See the Updating a Study section of this documentation for more information.

Who has access to my studies?

All users can see the information about your studies and the available timeslots. Administrators, the principal investigator (if applicable) and the researchers for the study are the only people who can see who has signed up, and modify the study.

Regulatory Compliance Guidelines

Introduction

This software complies with all major regulations governing human subject research and privacy of data stored online. The system complies with both HIPAA and Common Rule for customers in the

United States. For customers in Canada, it complies with the Personal Information Protection and Electronic Documents Act as well as the Tri-Council Statement. For customers in the European Union or in countries that follow OECD rules, it complies with OECD privacy rules and the European Union Directive of Data Protection. Your organization may or may not need to comply with the relevant regulations. Your research administrator can advise you on this situation.

Even if you are not required to comply, compliance is still a good idea, as protecting sensitive data is always a good thing. Compliance in the context of this system is as simple as reading the remaining paragraphs of this section (that apply to your organization) and following the guidelines contained therein. The remaining compliance issues involving software, privacy and electronic data storage are all handled automatically by the software. You should still consult with your IRB or organization to learn about additional compliance rules you must follow outside of use of this software (the handling of the data you collect during your study would be one example).

Some regulations (particularly the US HIPAA regulations) are focused primarily on health data. You may think the system does not store confidential health data (in HIPAA terms, it is called PHI -- Protected Health Information), but depending on how your organization uses the software, there may very well be confidential data in the system. Consider the case of a study that requires that a participant come from a family that has a history of mental illness. Merely knowing who signed up for that study can be considered confidential because that type of information should not be revealed to the public. It may turn out that your studies are not of such a nature, but even more benign situations, like a study that requires that participants be regular contact lens wearers, can be construed as confidential information. Organizations typically err on the side of caution given the criminal and civil penalties for violation of these types of regulations.

Data Handling and Security Guidelines

In your role, you have access to your studies and you can see who has signed up for those studies. You may also have access to prescreen responses. Because of these privileges, you should follow these simple guidelines:

- Secure Your Account. Use a password that is difficult to guess. The most secure passwords contain a combination of letters and numbers, do not spell a real word, and are at least 8 characters long. Your university IT department can provide you with assistance on choosing a secure password.
- Secure Your Work Area. If you are logged into the system and you leave your computer, you should logout of the system or use a password lock on your computer. Ask your network administrator for help with setting up a password lock.
- Handle Paper Documents Carefully. Any printouts from the system should be kept reasonably secure. Store them in a locking desk drawer out of the public view. Documents you decide to discard should be shredded if possible.

Human Subjects/Privacy Policy Acknowledgment

Upon your first login to the system, and every 6 months thereafter, you may be required to acknowledge your organization's policy on these matters, and this acknowledgement will be logged. Ask your research administrator if you have any questions.

INSTRUCTOR DOCUMENTATION

Introduction

The Experiment Management System is used for the scheduling and management of a research participant pool. As an instructor, your interaction with the system will be minimal, but also painless. Your primary use of the system will be to check on the credit status of students (participants) in your courses, though in some cases you may also have the ability to grant credits to your students, as well as view which studies are available to students.

Getting Started

The system works best if you use a web browser that is less than 2 years old. It works well with all recent versions of Internet Explorer, Firefox, Chrome, and Safari. It will work with other web browsers, and with older versions popular browsers, however the layout may not be as clean. No functionality will be lost by using an older web browser. Ask your IT department if you need help with installing or using a web browser. This documentation assumes you have a basic knowledge of how to use the web. On this system, it is not necessary to use the Back button. You can always use the toolbar on the top to navigate anywhere on the site.

Logging In

To login, go to the front page of the site (you will be given the URL by a member of your organization) and type in your username and password. If you have forgotten your password and the system is configured to allow password retrieval, you will see a link where you may choose to have your password reset and a new password emailed to you. Once you login, you will be presented with a Main Menu with a few options.

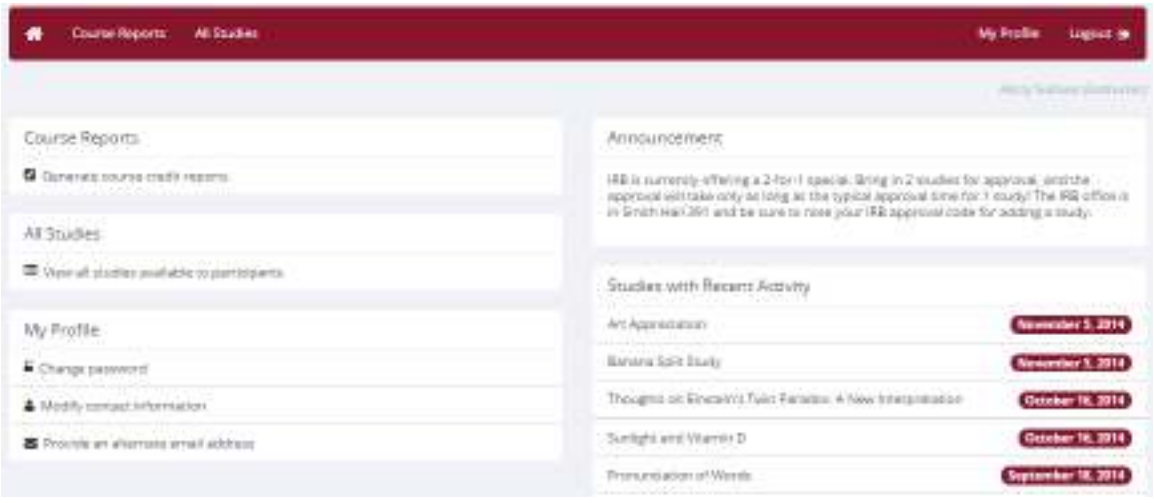


Figure 37 - Main Menu

Course Reports

On the Main Menu that you see after logging in, you will see an option to generate course reports. Once you click on that, you will see a list of all the courses you are listed as an instructor for, and you have the option to generate reports for each of those courses.

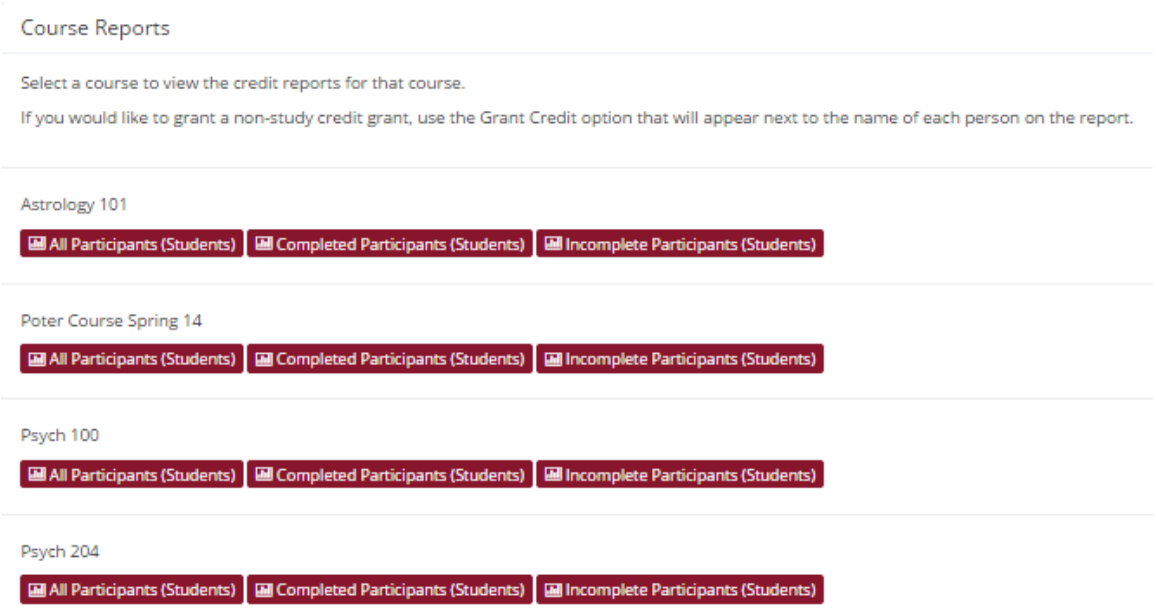

Course Reports
Select a course to view the credit reports for that course.
If you would like to grant a non-study credit grant, use the Grant Credit option that will appear next to the name of each person on the report.
Astrology 101
All Participants (Students)
Completed Participants (Students)
Incomplete Participants (Students)
Poter Course Spring 14
All Participants (Students)
Completed Participants (Students)
Incomplete Participants (Students)
Psych 100
All Participants (Students)
Completed Participants (Students)
Incomplete Participants (Students)
Psych 204
All Participants (Students)
Completed Participants (Students)
Incomplete Participants (Students)

Figure 38 - Course Listing

You have 3 choices for the type of report you would like to generate. All Participants will list all participants in the course. Completed Participants will list only participants who have met or exceeded their credit requirements. Incomplete Participants will list only participants who have *not* met their credit requirements. Click the link for the desired report.

The report will be listed in alphabetical order by a participant's last name, and participants that have not completed their requirements will be highlighted in bold. For privacy and ethical reasons, you will never see exactly which studies the students participated in – only a summary of their credit earnings. If for some reason this information is needed, the administrator can produce such a report for you using the Course Credit History report available to them.

If your system is configured as such, you will see a credit status for the participant overall, as well as for the listed course. If this is the case, you should look at a participant's credit for the *course* to determine if they have completed their requirements. If you do not see such a column ("Credits Earned for Course"), then you only need to be concerned with the overall credit completion status for the participant. If the report is too wide to be printed easily, you can use the Printer-Friendly format. A link to that will appear at the bottom of the report.

The report also includes a column indicating the Overall Unexcused No-Shows a participant has accrued. If you have a policy whereby you give some type of bonus for participants who do not accrue

any unexcused no-shows, then use this column to determine which participants fit into that category (look for values of 0).

If you would prefer to deal with the information in CSV (comma-separated) format (for easy import into a spreadsheet program like Excel), use the CSV link at the bottom of the report to generate such a data file. If you have problem working with the CSV format file, please contact your IT department for assistance – CSV is a standard data format and they be quite familiar with it.

To generate a new report, choose the Main Menu link from the left toolbar and proceed from there.

Granting Credits

In some cases, you might see a Grant Credit choice next to each name when you generate a course report. If you click on this link, you can grant a non-study credit grant to that student. This is useful if you are in charge of granting a student credit for participation in a research alternative (e.g., writing a paper), in lieu of actual research participation. To grant the credit, simply enter the credit value and a comment about the credit grant, and the credit will be granted immediately. If you grant a credit by mistake and would like to delete it, please contact the administrator and they can do this for you.

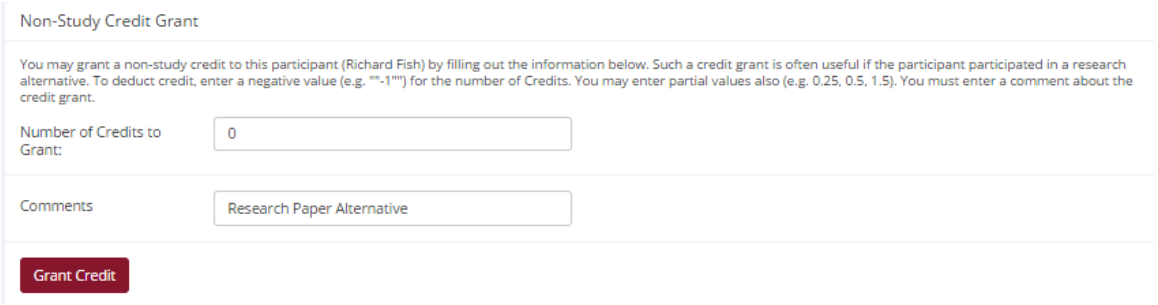

Non-Study Credit Grant
You may grant a non-study credit to this participant (Richard Fish) by filling out the information below. Such a credit grant is often useful if the participant participated in a research alternative. To deduct credit, enter a negative value (e.g. ""-1"") for the number of Credits. You may enter partial values also (e.g. 0.25, 0.5, 1.5). You must enter a comment about the credit grant.
Number of Credits to Grant:
0
Comments
Research Paper Alternative
Grant Credit

Figure 39 - Non-Study Credit Grant

Viewing Studies

In some cases, you may have the ability to view what studies are available in the system (to students). This is useful if you want to discuss information or concepts from those studies in class, as a part of the educational experience. If such an option is available, you will see an All Studies link after you login. If you click this, you will see a list of studies, and you may then click on any study to view more about it. For privacy reasons, you may not see who has signed up for any of the studies.

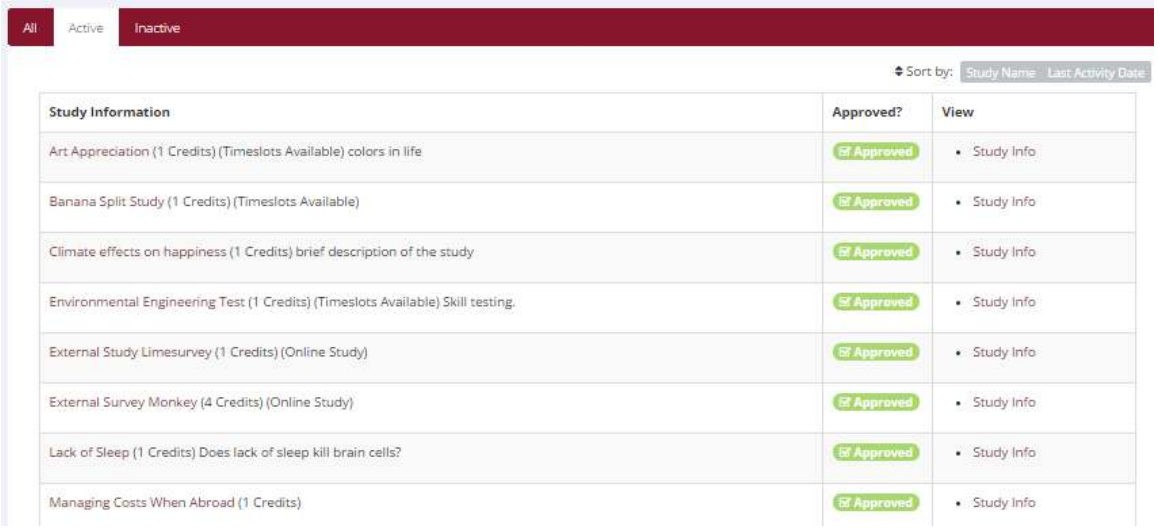


Figure 40 - Viewing Studies

Changing Your Password

To change your password or other information, choose the My Profile choice from the toolbar.

If you change your password, please be sure to select a password you do not use on any other systems or websites, which is a good computing practice.

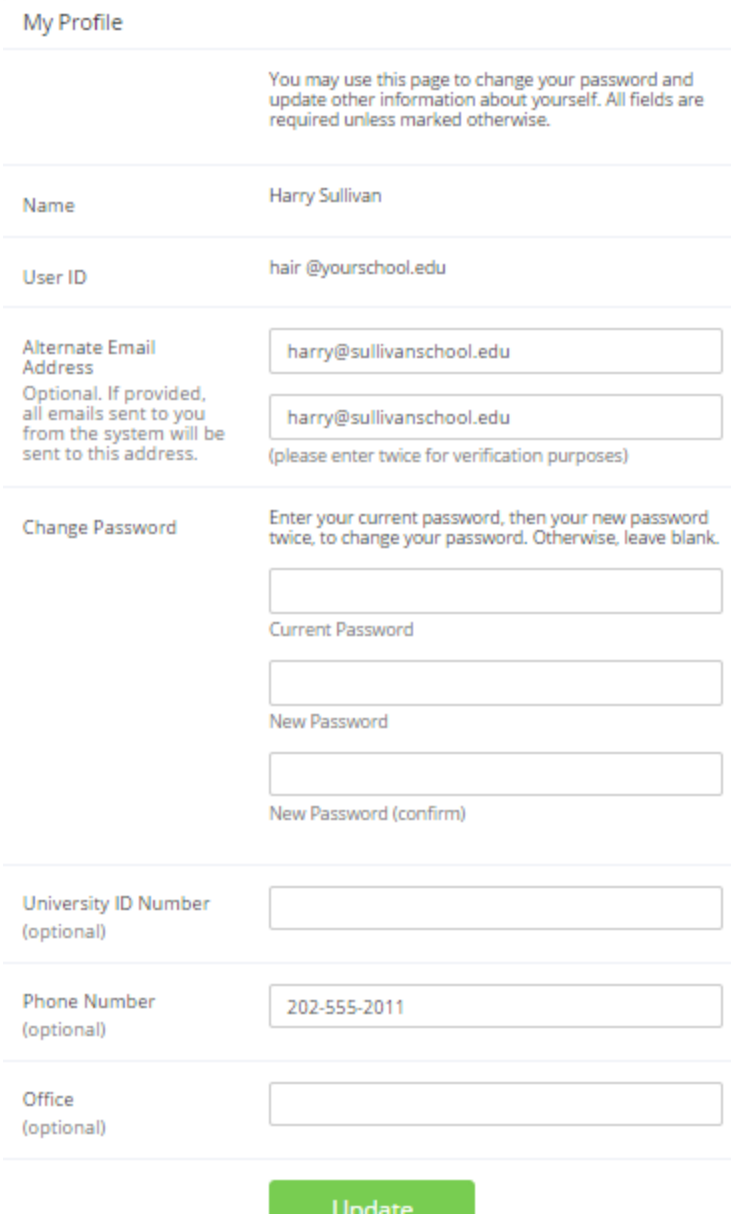

My Profile
You may use this page to change your password and update other information about yourself. All fields are required unless marked otherwise.
Name
Harry Sullivan
User ID
hair @yourschool.edu
Alternate Email Address
Optional. If provided, all emails sent to you from the system will be sent to this address.
harry@sullivanschool.edu
harry@sullivanschool.edu
(please enter twice for verification purposes)
Change Password
Enter your current password, then your new password twice, to change your password. Otherwise, leave blank.
Current Password
New Password
New Password (confirm)
University ID Number
(optional)
Phone Number
(optional)
202-555-2011
Office
(optional)
Update

Figure 41 - Updating Your Profile

In situations where the system is configured so you may enter an email address on this page, you will be asked to enter it twice when changing the address, to ensure it is typed correctly.

Logging Out

When you are done using the system, choose Logout from the top toolbar to log out. You are now logged out. It is always a good security measure to close all your browser windows as well, especially if you are using a computer that is shared by others.

ADMINISTRATOR DOCUMENTATION

Introduction

As an administrator, you will need to perform many tasks that only an administrator has the rights to perform. Though the number of tasks may seem daunting at first, you will quickly realize that everything is rather straightforward, and should take a minimal amount of your time. For your convenience, we have included a section of Typical Administrator Tasks to get you up and running quickly, while tasks are further detailed later on in the documentation.

Getting Started

As an administrator, you were provided with a login and password to access the system, as well as a URL (web address) for the system. To log in, you should go to the specified URL by typing it into your web browser. It is recommended that you use any popular web browser produced in the last 2 years, including Internet Explorer, Firefox, Chrome, and Safari. The software will work with older web browsers, though the layout and display might not be as streamlined.

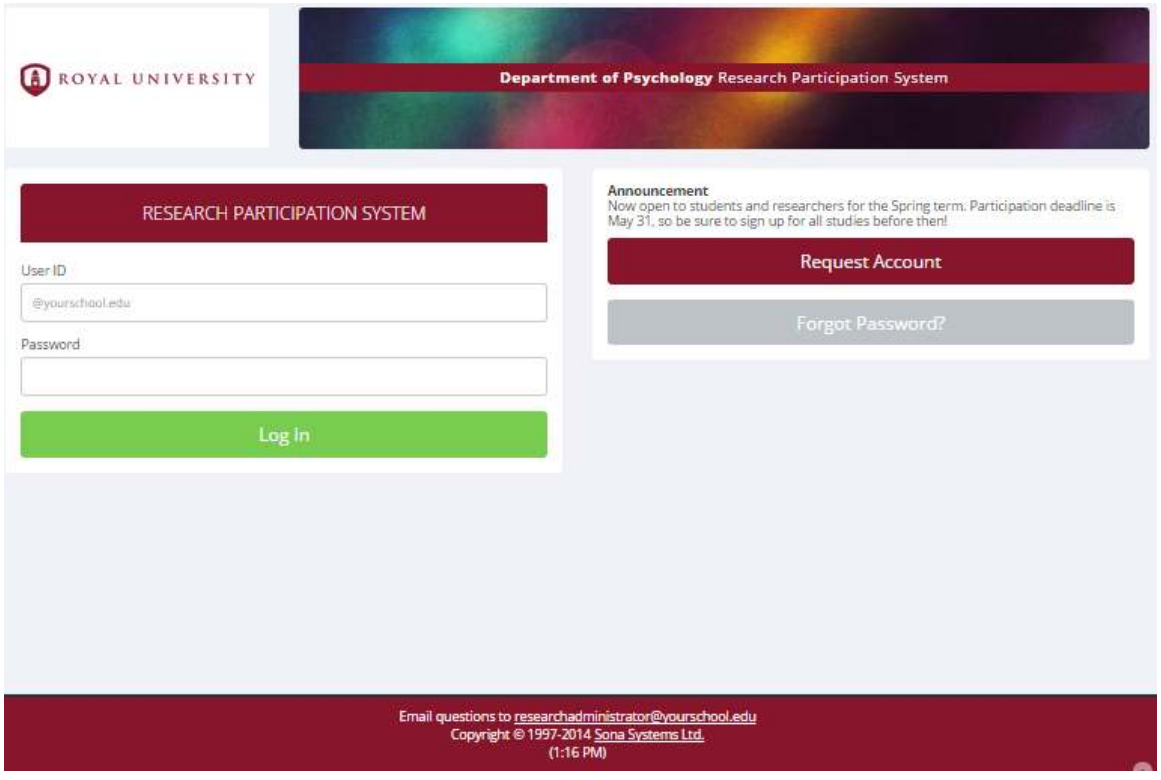

ROYAL UNIVERSITY
Department of Psychology Research Participation System
RESEARCH PARTICIPATION SYSTEM
User ID
@yourschool.edu
Password
Log in
Announcement
Now open to students and researchers for the Spring term. Participation deadline is May 31, so be sure to sign up for all studies before then!
Request Account
Forgot Password?
Email questions to researchadministrator@yourschool.edu
Copyright © 1997-2014 Sona Systems Ltd.
(1:16 PM)

Figure 42 - Login Page

You will note from the front page of the site that a login is required. It is required of every user in the system. The system menus and features adjust based on the privileges and type of user that is logged in. As an administrator, your menu of choices is much larger than a participant's menu, for example.

Main Menu and Dashboard

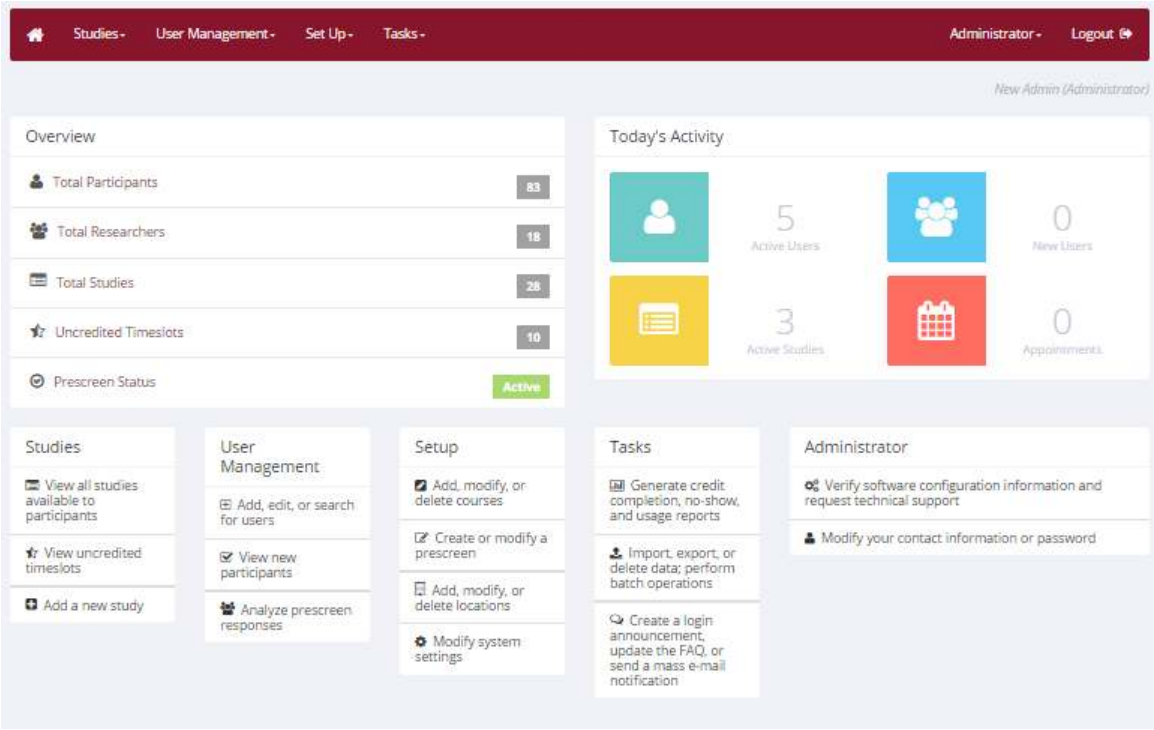


Figure 43 - Administrator Main Menu

After you log in, you will see the dashboard giving you an overview of activity in the system. In the Today's Activity section, you will see the following:

- Active Users: The number of users that logged in today.
- New Users: The number of users whose accounts were created today.
- Active Studies: The number of studies that had activity today. Usually this is if the study had a sign-up or cancellation take place today, or the researcher made changes to the study.
- Appointments: The number of appointments for lab studies scheduled for today, where participation has not already been noted. For example, if you are looking at this in the afternoon, then the appointments from earlier that day will only be included if the researcher has not yet taken action (i.e., they are in No Action Taken state).

The information on the dashboard is cached for performance reasons, and is updated every five minutes.

If this is your first time logging into the system, the first step is to secure your password. You may have been given a default password to log in. Choose Update My Profile from the Administrator menu to change your password and other information. It is strongly recommended you change the password to a secure password you can easily remember, but is hard for others to guess. A secure password contains at least 8 characters, and is a combination of letters and numbers. Do not disclose this password to others, as Administrator accounts have full privileges throughout the system and thus are very powerful.

Typical Administrator Tasks

Each of the tasks listed below is documented in this manual. This list is intended to give you an idea of the tasks you might generally perform at various times during the term. See the appropriate section of this documentation for more information.

Start-of-Term Tasks

- Set up courses for the upcoming term, and make old courses non-Selectable, if necessary. See Course Maintenance.
- Set up locations (rooms) in the system, if location scheduling is enabled. See Location Maintenance.
- Import or add users into the system. This may not be necessary for participant accounts if you have Participant Account Self-Creation enabled (see Participant Account Self-Creation). You will need to add or import users of other types (researchers, instructors, principal investigators) if they do not already have accounts. See Importing Users, and Adding and Editing Users.
- Update the System Announcement with any new information, if necessary. See Updating the System Announcement.
- Set up and activate the prescreen, if applicable (see Online Prescreens).
- Adjust Study Scheduling Deadline and Participant Progress Display dates, if applicable. See System Settings.

Ongoing Tasks

- Approve users, if Participant Account Self-Creation is enabled and Automatic Account Approval is disabled. See Approving Accounts.
- Monitor studies, if necessary. This may include approving new or changed studies, and updating study timeslot usage quotas. See Monitoring Studies.

End-of-Term Tasks

- View reports on participant completion. See Generating Reports.
- Clear out and export data in preparation for the new term. See End-of-Semester Maintenance.
- Delete old studies and user accounts (of all types) that haven't logged into the system in a while, as needed. See Batch Study Deletion and Basic End-of-Semester Maintenance.

General User Notes

There are 5 types of users supported by the software: Administrator, Participant, Instructor, Researcher, and Principal Investigator (when enabled). All users must log in to use the system, and privileges and features vary based on the user type.

User IDs

While all accounts and user types are treated separately, it is important to note that the user ID must be unique across all types of users. For example, if there is a participant with the user ID "jsmith", then there cannot be a researcher with the same user ID.

Usually, schools choose to use a school-wide user ID for the user ID, and this is often derived from the email address. For instance, if all users at Acme University have an email address of *username*@acme.edu, then that convention for user IDs is unique (there cannot be two users with the same username @acme.edu), and a good scheme to use. In this example, a user with the email address "jsmith@acme.edu" should use the user ID "jsmith" on the system.

The user ID and password combination is unique to this system, so users can choose a password different from the one they use on other systems (like their email system). The system can also automatically generate a random, secure password for users, which they can change if desired.

If you do not have a common domain (@ suffix), which usually occurs when inviting members from the community at large to participate in research, you may leave the "@ Suffix" setting (see System Settings) blank. In that case, users can choose any user ID, but they will also be required to provide an email address so the system may contact them when necessary.

Duplicate User IDs – Users with Multiple Roles

There may be a case where you try to add a user whose user ID is already taken. Most likely, this situation occurs when a person has more than one role in the system, such as a person who is both a Researcher and an Instructor.

Because the system does not allow for duplicate user IDs, the simple solution is to create two accounts with slightly different user IDs. If the user's researcher account is "jsmith", for example, then you could create a separate administrator account for that user with the ID "jsmith_instructor", assuming "jsmith_instructor" isn't an otherwise legitimate (and taken) user ID. If you go this route, be sure to add an alternate email address for the account with their correct email address, or automatically-generated emails to this user (from the system) will have delivery problems. See the section on Emails and User IDs for more information.

If you have provided an empty "@ Suffix" (see System Settings), then you can use any user ID that is not unique. In this situation, the system will prevent two participants requesting accounts from providing the same email address. In the case of an administrator who is creating accounts, it will merely give a warning, but will allow it. There is usually a good reason more than one account has the same email address, and it is often that the same person has two accounts because they perform two different roles.

The system will list the type of user the person is logged in as in the top right corner of every page (after they have logged in), so they will not forget what type of user account they are using at the moment if they have more than one account.

Emails and User IDs

If the "@ Suffix" is provided (see System Settings), which it is in most systems, then the user ID is typically derived from the user's university email address. The user ID is also used when email needs to be sent from the system to the user. Typical emails that are sent include credit notification and study sign-up confirmation emails (when enabled).

When sending an email, the system will first see if the user has provided an alternate email address. If this exists, it will be used. The user can add or modify their alternate email address from the "Update My Profile" link on the Main Menu after login. It can also be provided when an administrator creates the account through a data import or the Add User form.

If an alternate email address is not on file, the system will send an email to the address created by taking the user's user ID and appending @ and the "@ suffix" to the end of it. As an example, for the user ID "jsmith" and an @ suffix of "acme.edu", the email would be sent to "jsmith@acme.edu". The @ suffix is specified in System Settings.

If the "@ Suffix" is blank (see System Settings), then the system will always send to the email address provided by the user (in this situation, it is listed simply as the "Email Address" and not "Alternate Email Address", since it is mandatory when configured this way).

The alternate email address feature may be disabled for participants, with the "Enable Alt. Email" system setting (see System Settings).

Participant Unique ID Codes

If enabled (see Participant Identification in System Settings), participants may be identified to researchers only by a unique, numeric ID code, or by only their first name. One of these options is generally desirable when protecting a participant's privacy is very important.

If this setting is set to ID codes, then the system will automatically generate a numeric ID code for each participant, and they will be reminded of this ID code in any email communication generated from the system to participants (e.g., study reminder emails). Their ID code is also listed on their profile page for easy reference. Participants continue to log in with their normal username, not their ID code. The ID code is the same for the participant across all studies they sign up for.

Researchers only see a participant's ID code, and not their name or email address. Instructors see only the participant's names (not ID codes), as this information is necessary to link the participant to their course for proper crediting.

Administrators have access to both a participant's ID code and name, as this information is necessary when performing routine maintenance tasks. Because of this, the administrator should be careful when handling this sensitive information.

You should consult with your IRB about this feature. Many regulations governing human subject research require that Unique ID codes are used.

If you do not require this high level of privacy, it may be acceptable to choose the option where participants are identified to researchers by only their first name. This makes it easier to take attendance of who arrived for an appointment, while still offering some level of privacy.

If you change this value, this will affect the ability for external web study crediting integration to work for participants who have signed up for such a study but have not yet received credit. It will not affect those who have already received credit for such studies, or for those who sign up after the change. For this reason, we recommend waiting until after the semester has ended to change this setting.

Importing Users

The system features a method for bulk importing a set of user accounts, known as the User Import Wizard. You may use this feature to import Participant, Researcher, Instructor, or Principal Investigator (when enabled) accounts. Administrator accounts cannot be imported through the Import Wizard. See Adding and Editing Users for information on adding Administrator accounts.

The methods for adding users into the system are not mutually exclusive. For instance, you can add a set of participants through the Import Wizard, while still enabling the Participant Account Self-Creation feature. The system will automatically prevent duplicate user entries by verifying that a user ID is not taken when an attempt to create the account is made. If a user ID already exists in the system, but the account was deactivated (not allowed to login to the system), then their account will be reactivated when doing the user import.

Preparation Tasks

The Import Wizard is a multi-step process. You should run only one import at a time, and you should have your data file ready when you start the import. Do not use the back button on your browser at any point during the process. The system will expire your login session after a period of inactivity (the exact period is listed on the first page of the Import Wizard, but it is usually around 20 minutes), so it is important to move through the process with this timeout period in mind. In addition, the system may take a few moments to process your import file, so please be patient as you go through the steps. If you receive a timeout error when performing the import (typically after Step 4), then you have probably pasted in too many rows of data. Try to reduce the number of rows and try again – you can run the import more than once per course. A general guideline to use is to import only 100-200 users at a time, though you are welcome to try with larger numbers to see if it will work.

The Import Wizard expects you to have a text file in comma-separated (CSV) format, or you may upload an Excel file. Most institutions receive course rosters from the registrar or SIS as an Excel spreadsheet. Once you receive the data in this format, you should clean up or make changes to the data directly in the spreadsheet, as it is the easiest method for data cleanup. Once you have prepared the data, choose the Save As.. feature in Excel to save the file as a comma-separated file, or simply upload the Excel file. If you are pasting in CSV data as opposed to uploading and Excel file, the Import Wizard generally expects each data item to be surrounded by “quotes” and each item to be separated by a comma. If you use a program like Excel to generate the CSV file, all fields may not necessarily be surrounded by quotes. This may be acceptable – go through the import process and the system will notify you if there was a problem with the format. The system is quite flexible in dealing with poorly-formatted CSV data.

If you are uploading an Excel file and run into errors, where none of the rows of data can be read, you may want to try saving the file in an older Excel format, as those are often easier for the system to read.

If pasting in CSV data, only one user record should appear on each line. The fields may appear in any order as long as it is consistent throughout the file. Step 2 of the Import Wizard allows you to list which fields are contained in your import file.

You may encounter difficulties if you open up the data in Excel, select it, copy it, then paste it into the system. The reason is that Excel does some other formatting of the data during this process. Instead, you should save the file in CSV format in Excel, then open up the saved file using a text editor, like Notepad. That will open the raw CSV file and you should be able to copy and paste from that without issue.

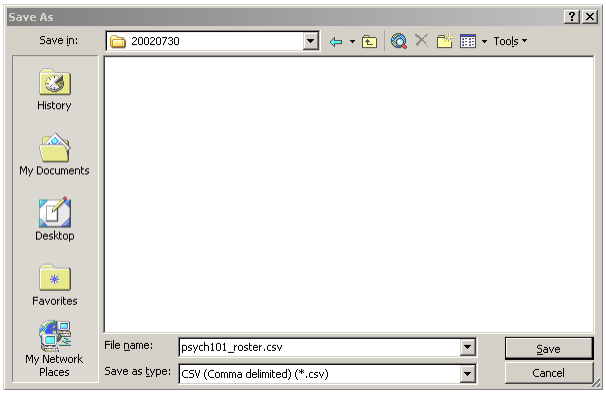


Figure 44 - Excel CSV Save As Feature

To be clear, while the import feature provides the option to upload an Excel file or paste in CSV data, you should use only one option, and not both, when doing the import.

Definitive List Import Option

When importing participant accounts (this option only applies to participant accounts), there will be a Definitive List choice on Step 2 of the import process. If selected, the system will assume that the list of participants you provide in Step 4 is the *definitive* list for the course specified. What this means is that any participants who were already in that course (but not in the list you are importing) will be removed from that course though their accounts will remain in the system. This is a good way to handle course add/drops at a later date, however care should be taken as it can result in participants being removed from the course.

As this option results in moving participants into and out of certain courses, this may cause their credit requirements (which are based on which courses they are in) to be recomputed. If you have the system configured to assess no-show penalties, *and* the penalties are added to credit requirements, then this may result in the credit requirements being recomputed incorrectly, as accrued penalties (or manual credit requirement adjustments by the administrator) are not taken into account. If your site is configured this way, the system will give a warning to make you aware of this.

In short, here is what the system will do when you use the definitive list option:

- If the participant is in the list you specified, and is already in the course, they will remain in the course.
- If the participant is in the list you specified, and they are not in the course, they will be added to the course. They will not be removed from any other courses they were already in.
- If the participant is not in the list you specified, but they are in the course, then they will be removed from the course. They will not be removed from any other courses they are in, and their account will not be removed. If they were only in this course (so the result is that they will be in no courses after the import is complete), then they will be asked to select a course upon their next login, from the list of courses marked Selectable in Course Listings.

In general, as the Definitive List feature can result in participants being removed from a course, we recommend only advanced users make use of this option. If you are unsure, it's better not to use this feature.

Performing the Import

Start the user import by choosing System Maintenance and Data Management then Data Import, while logged in as an Administrator. If there was an existing import from before that was never fully completed, you will be given the opportunity to delete the import in progress or resume it.

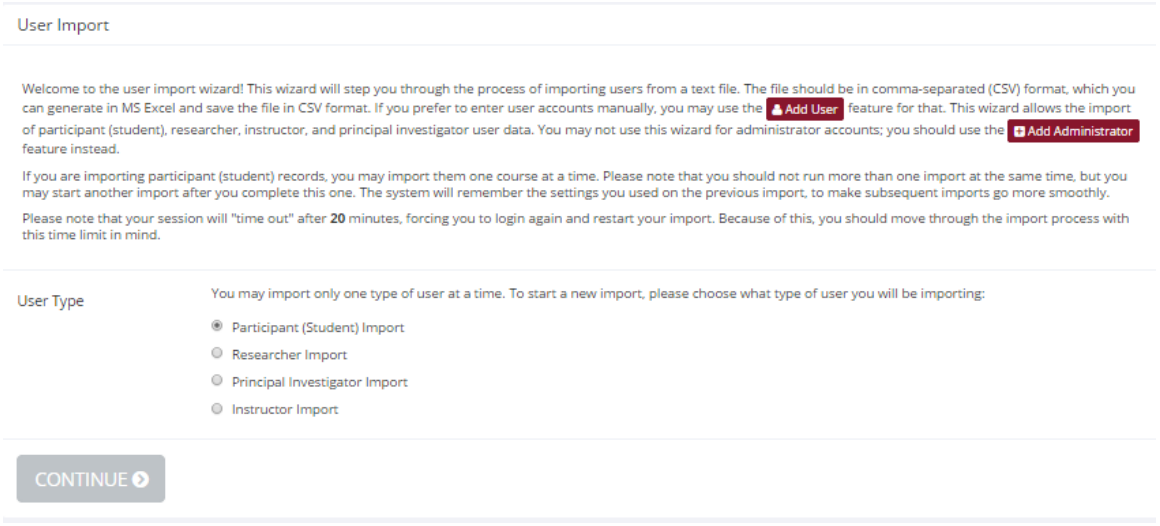

User Import
Welcome to the user import wizard! This wizard will step you through the process of importing users from a text file. The file should be in comma-separated (CSV) format, which you can generate in MS Excel and save the file in CSV format. If you prefer to enter user accounts manually, you may use the Add User feature for that. This wizard allows the import of participant (student), researcher, instructor, and principal investigator user data. You may not use this wizard for administrator accounts; you should use the Add Administrator feature instead.
If you are importing participant (student) records, you may import them one course at a time. Please note that you should not run more than one import at the same time, but you may start another import after you complete this one. The system will remember the settings you used on the previous import, to make subsequent imports go more smoothly.
Please note that your session will "time out" after 20 minutes, forcing you to login again and restart your import. Because of this, you should move through the import process with this time limit in mind.
User Type
You may import only one type of user at a time. To start a new import, please choose what type of user you will be importing:
Participant (Student) Import
Researcher Import
Principal Investigator Import
Instructor Import
CONTINUE

Figure 45 - Import Wizard Step 1

When you start a new import, you must first choose what type of users you would like to import. If you are importing participants, you must also choose what course the participants are in. The system will usually remember the settings you chose for the last import (fields, field ordering), so the process is likely to go very quickly if you are doing multiple imports.

Listed below is a table of the fields and which user types they apply to, as well as any restrictions about the fields.

Field Name	Applies To	Comments
First Name	All Users	Required. Maximum length: 50 characters.
Last Name	All Users	Required. Maximum length: 50 characters.
User ID	All Users	Required. Must be unique in the system. Maximum length: 30 characters. Do not include the @ suffix (e.g. "@yourschool.edu").
Password	All Users	Optional. Maximum length: 20 characters. If this is not included, the system will generate a random password for each user.
University ID Number	All Users	Optional. Maximum length: 20 characters. This option will not appear if importing participants and the Student ID Deactivation setting is on (see System Settings). If you are importing participant accounts, and the system is configured so that university ID numbers are required and must be unique, then the system will reject participants where the university ID specified in the import is already used by another participant in the system.
Phone Number	All Users	Optional. Maximum length: 20 characters.
Alternate Email Address	All Users	Optional if "@ Suffix" is provided, Required if "@ Suffix" is empty (see System Settings). Maximum length: 100 characters.
Course	Participants	This is selected during the import, and should not be included in your import file. You may import only one course at a time, for system performance reasons.
Office Location	Researchers, PIs, Instructors	Optional. Maximum length: 50 characters.

In Step 2 of the Import Wizard, you will be asked to choose which fields you will be importing. Only the required fields *must* be provided in your import file.

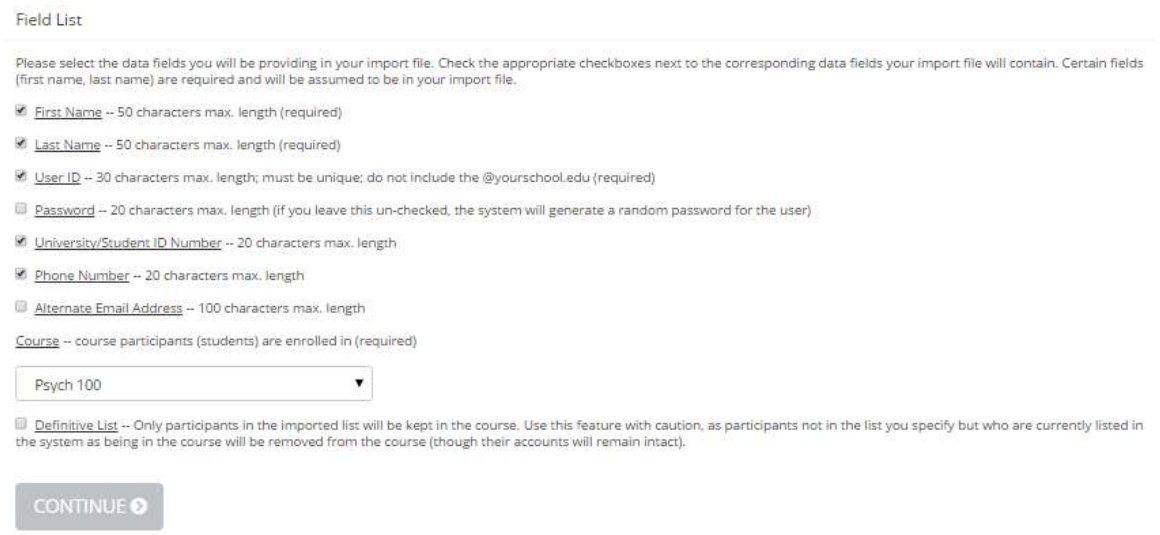

Field List
Please select the data fields you will be providing in your import file. Check the appropriate checkboxes next to the corresponding data fields your import file will contain. Certain fields (first name, last name) are required and will be assumed to be in your import file.
First Name -- 50 characters max. length (required)
Last Name -- 50 characters max. length (required)
User ID -- 30 characters max. length; must be unique; do not include the @yourschool.edu (required)
Password -- 20 characters max. length (if you leave this un-checked, the system will generate a random password for the user)
University/Student ID Number -- 20 characters max. length
Phone Number -- 20 characters max. length
Alternate Email Address -- 100 characters max. length
Course -- course participants (students) are enrolled in (required)
Psych 100
Definitive List -- Only participants in the imported list will be kept in the course. Use this feature with caution, as participants not in the list you specify but who are currently listed in the system as being in the course will be removed from the course (though their accounts will remain intact).
CONTINUE

Figure 46 - Import Wizard Step 2

Once you select the fields you will be providing in your import file, you should choose the order as they are listed (left-to-right) in your import file. On this Step 3 page, you should type in the number next to each field corresponding to the order in the file (1 for the first field, 2 for the second field, and so on). It is *very important* that you use every number once and only once. Duplication of numbers may cause unexpected problems during the import.

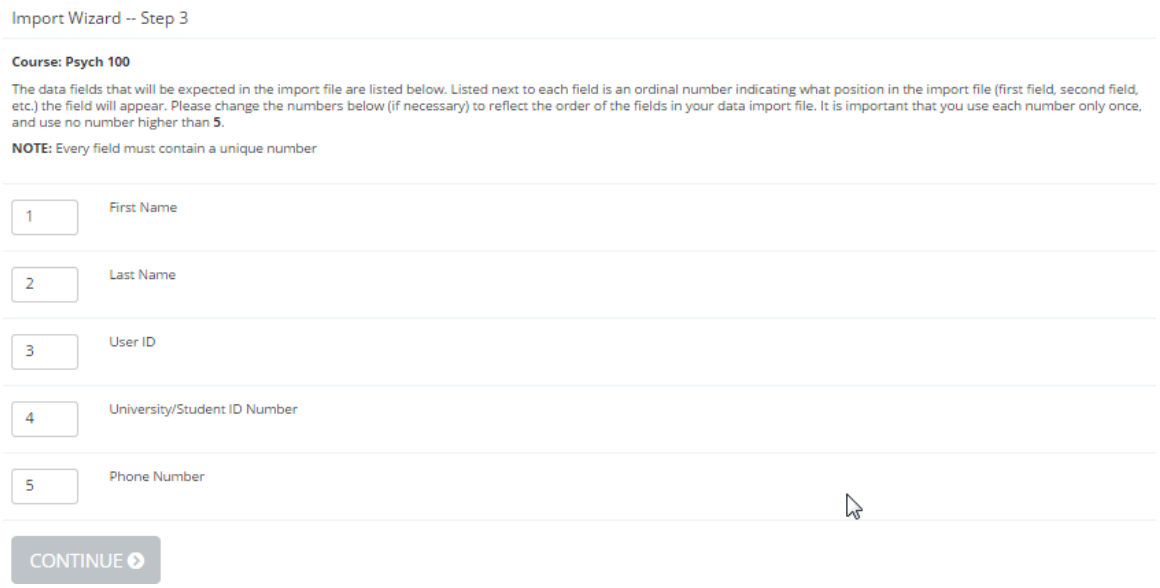

Import Wizard -- Step 3
Course: Psych 100
The data fields that will be expected in the import file are listed below. Listed next to each field is an ordinal number indicating what position in the import file (first field, second field, etc.) the field will appear. Please change the numbers below (if necessary) to reflect the order of the fields in your data import file. It is important that you use each number only once, and use no number higher than 5.
NOTE: Every field must contain a unique number
1 First Name
2 Last Name
3 User ID
4 University/Student ID Number
5 Phone Number
CONTINUE

Figure 47 - Import Wizard Step 3

After choosing the order for the fields, you will proceed to Step 4 of the import process, where you paste in the contents of your import file or upload an Excel file.

If you are pasting in CSV data, the easiest way to do this is to open up the file in a text editor like Notepad (Notepad is a program on Windows computers, and is found in the Start | Programs | Accessories menu). Make sure to turn off the Word Wrap feature on Notepad after opening the file

with Notepad. Copy the appropriate lines of the file and paste them into the provided area in the Import Wizard. Do not include any header lines which describe the field names – just the data is necessary. Microsoft Word is not a good tool to use when dealing with CSV data, because it might try to include some formatting options of its own.

If you are instead uploading an Excel file, then select the file (you'll see a Choose File option or similar on the screen). If the first row of the file (row 1) contains the field headers and not actual information to import, then check the "First row of file is a header row" checkbox. Before importing your Excel file, be sure the data you want to import is on the first worksheet in the workbook, and that there are no extra columns of data that will not be imported. For example, there could be a column indicating the participants' date of birth, but since the system does not store this information, you should just delete the column before importing it. If the system has difficult reading the Excel file, you can try saving it as an older version of Excel (using the Save As option in Excel) or even saving it as a CSV, then opening up the CSV file in a text editor and copy-pasting it into the text area.

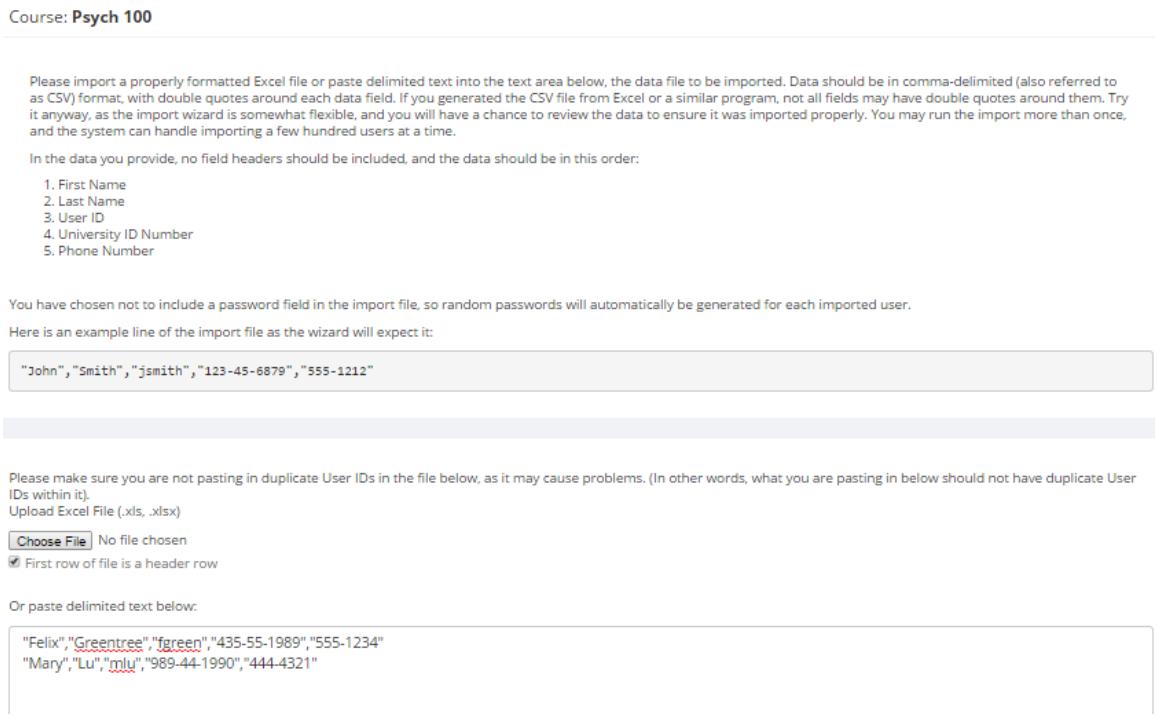

Course: Psych 100
Please import a properly formatted Excel file or paste delimited text into the text area below, the data file to be imported. Data should be in comma-delimited (also referred to as CSV) format, with double quotes around each data field. If you generated the CSV file from Excel or a similar program, not all fields may have double quotes around them. Try it anyway, as the import wizard is somewhat flexible, and you will have a chance to review the data to ensure it was imported properly. You may run the import more than once, and the system can handle importing a few hundred users at a time.
In the data you provide, no field headers should be included, and the data should be in this order:
1. First Name
2. Last Name
3. User ID
4. University ID Number
5. Phone Number
You have chosen not to include a password field in the import file, so random passwords will automatically be generated for each imported user.
Here is an example line of the import file as the wizard will expect it:
"John","Smith","jsmith","123-45-6879","555-1212"
Please make sure you are not pasting in duplicate User IDs in the file below, as it may cause problems. (In other words, what you are pasting in below should not have duplicate User IDs within it).
Upload Excel File (.xls, .xlsx)
Choose File
No file chosen
First row of file is a header row
Or paste delimited text below:
"Felix","Greentree","fgreen","435-55-1989","555-1234"
"Mary","Lu","mlu","989-44-1990","444-4321"

Figure 48 - Import Wizard Step 4

After you paste in or upload the appropriate information, click Continue to proceed. Note it may take a few moments to process the import file. The Import Wizard is busy processing your import and checking for any errors in the data.

You will see a resulting page (Step 5) that lists the data as the system was able to read it. Any records with problems will be highlighted, and the problem(s) will be identified. At this point, you can choose to re-paste the import, proceed, or cancel.

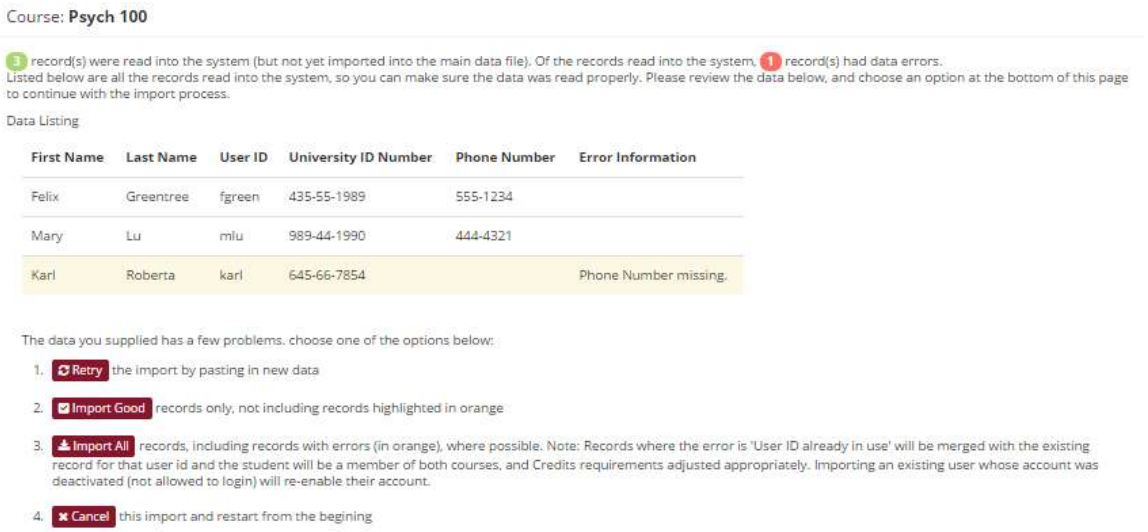

Course: Psych 100
3 record(s) were read into the system (but not yet imported into the main data file). Of the records read into the system, 1 record(s) had data errors.
Listed below are all the records read into the system, so you can make sure the data was read properly. Please review the data below, and choose an option at the bottom of this page to continue with the import process.
Data Listing
First Name
Last Name
User ID
University ID Number
Phone Number
Error Information
Felix
Greentree
fgreen
435-55-1989
555-1234
Mary
Lu
mlu
989-44-1990
444-4321
Karl
Roberta
karl
645-66-7854
Phone Number missing.
The data you supplied has a few problems. choose one of the options below:
1. Retry the import by pasting in new data
2. Import Good records only, not including records highlighted in orange
3. Import All records, including records with errors (in orange), where possible. Note: Records where the error is 'User ID already in use' will be merged with the existing record for that user id and the student will be a member of both courses, and Credits requirements adjusted appropriately. Importing an existing user whose account was deactivated (not allowed to login) will re-enable their account.
4. Cancel this import and restart from the begining

Figure 49 - Import Wizard Step 5

If you choose to proceed, you have two options depending on whether your import file had errors. If your import file had no errors, you can simply proceed. If your import file had errors, you can elect to have the system import only the records that were completely acceptable (those not highlighted in yellow). Or, the system can import the acceptable records, and attempt to fix the unacceptable records and import them as well. Generally, the system can fix all problems except when key required missing fields are missing, mainly the name or User ID. All other problems can generally be fixed.

There is a special case to be aware of: if you are importing a participant that is already in the system (this is checked by matching their user ID) and they are in a different course, and you choose the Import All option, then the participant will simply have the new course (the course you are currently doing the import for) added to their existing record, and their credit requirements adjusted accordingly. This makes it easier to run imports when participants can be a member of multiple courses. This behavior only occurs if Multiple Course Support is enabled in System Settings. If it is not enabled, then the participant will remain in their existing course and not be moved into the course being imported, unless they are not currently in a course, in which case they will be added to the course being imported.

When using the Import All option, if you import a user who already exists in the system, the system will not update any of their data (e.g., if their name is different in the import file compared to what was already in the system). Instead, it will use the data already in the system. The only exception is that if the user was previously prevented from logging into the system, the import function will reactivate their account for login.

Regardless of how you proceed, you will then receive a status report on your import, indicating how many records were imported. *You must continue to properly finish the import*. At this point, you may choose whether to email the newly-imported users with their login information. Regardless of your choice to email them or not, is it *very important* to proceed to the next and final step of the import, as that will properly complete the import and clear out any remnant data from the import process itself.

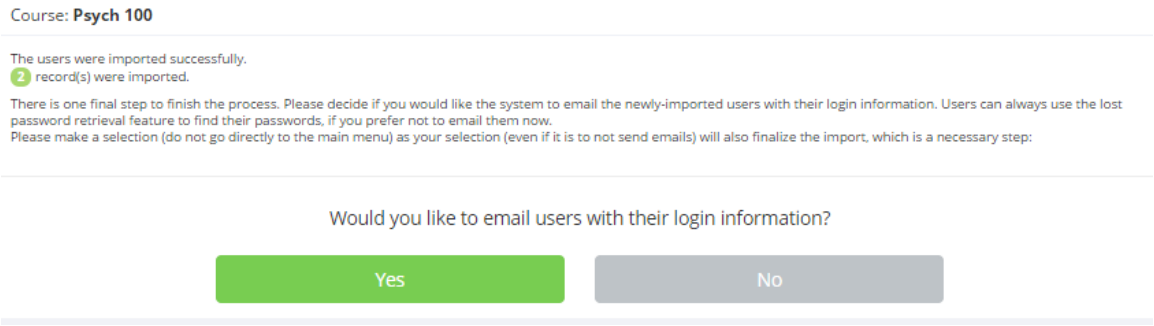

Course: Psych 100
The users were imported successfully.
2 record(s) were imported.
There is one final step to finish the process. Please decide if you would like the system to email the newly-imported users with their login information. Users can always use the lost password retrieval feature to find their passwords, if you prefer not to email them now.
Please make a selection (do not go directly to the main menu) as your selection (even if it is to not send emails) will also finalize the import, which is a necessary step:
Would you like to email users with their login information?
Yes
No

Figure 50 - Import Wizard Step 6

If you imported a large number of users and chose to email users with their login information, the system will send the email in groups. You will be notified of the progress on-screen. If you prefer not to email users with their login information at this point, they can retrieve it themselves with the lost password feature on the front page of the site, if you have enabled this feature (see System Settings). Another option to send login information to them at a later time is to use the Mass Email Notification feature, which has an option to include login information in the message you send.

Once you have finished, you are taken back to the Main Menu, where you may start another import if you wish. Do not use the back button on your browser to go back, as it may cause an error with the import you just performed.

Adding and Editing Users

Overview

Besides using the user import feature or participant account self-creation (when enabled), you may also manually add and edit users, on a per-user basis. If you are editing a participant record, this part of the system also provides the facility for manual credit granting, and the ability to monitor a participant's progress. It should be noted that this user add and edit feature is also the only facility for adding administrator accounts.

This facility also provides the ability to add administrative comments about any user. This is where you may keep special notes about a user, and these notes are not visible to anyone except administrators.

Finding Users

Choose the View and Edit Users option from User Management toolbar section to get started. You will see a search tool at the top, and some other quick search features, as well as a partial list of users.

To quickly view a list of all users of a certain user type (with the exception of participants), click the All Researchers (or other desired user type) link.

To view a subset of users, use the search tool at the top of the page. Select the type of user you would like to search for, then type part of their name, email, username or university ID number to search for

them. You may also have the option to search by a participant's anonymous ID code, if anonymous ID codes are enabled in System Settings.

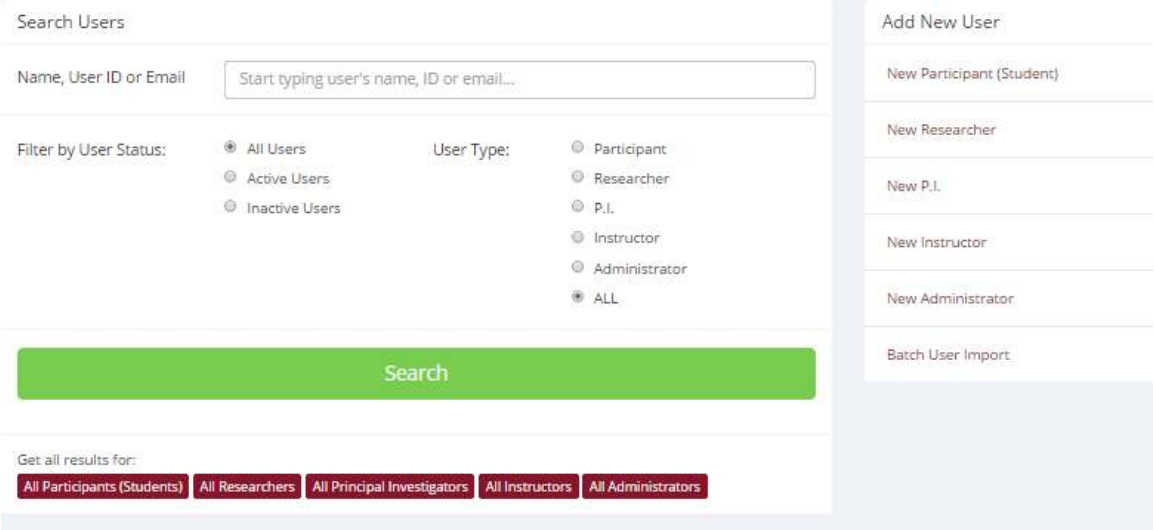


Figure 51 - View and Edit Users Search Tool

The Filter by User Status allows you to limit your search based on whether the user is allowed to login to the system. The choice "active" corresponds to being allowed to login to the system.

Editing Users

Once you find the user you would like to edit, choose the Edit User option. You can view all information about the user. If it is a participant, you will also see a list of their study sign-ups and progress, and have the opportunity to grant them a non-study credit. You can also change course assignments for participants here. Finally, you can adjust a participant's credit requirements if necessary.

If you have Multiple Course Support enabled (see System Settings), and you change a participant's course assignments, you may need to manually adjust their credit requirements, as they are not recomputed if the course assignments are changed. To make this easier, the course requirements for each course are listed next to the course name. If the system is configured such that participants may assign their credits to a specific course, then you will have the option to transfer their credits from their old course to one of their new courses, if you are changing which courses the participant is a member of.

In some cases, you may want the participant to self-select which courses they belong to again. To do this, set their course to "NONE", and the participant will be prompted to select their course(s) upon their next login. Note that setting their courses to NONE will also reset their credits needed value to 0, and it will then be recomputed after they select their courses.

If Online Prescreening is enabled, and the participant has completed the prescreen, you will have an opportunity to delete their prescreen responses. Typically, this is only done if the participant for some

reason wants to take the prescreen again (like if they answered some questions incorrectly the first time). Deleting their prescreen responses will also delete any credit the participant received for completing the prescreen.

You cannot see the user's current password because it is stored in a hashed (encrypted) format and cannot be retrieved. You may change it by typing in a new password, or just leave it blank. If the field is left blank while updating the user's record, no change will be made to the user's password. For purposes of logging in, passwords are case-sensitive.

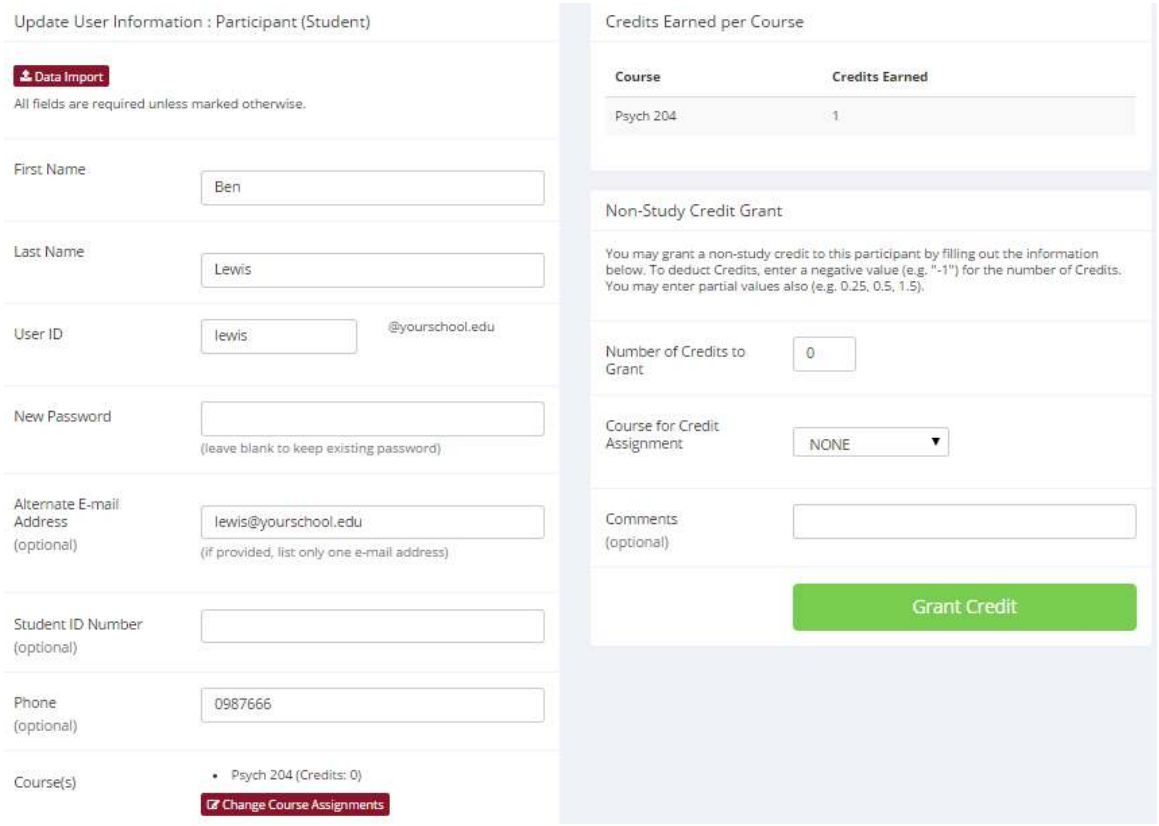


Figure 52- Updating a Participant Record

If you would like to email the user with their login information while in the process of adding or editing a user, choose the Email user with their login information choice (from the Yes/No option), and an email will be sent to them with their login information as soon as the record is saved by clicking Save Changes. If you are adding a new user, their password will be sent with the login information. If you are updating an existing user, their password will only be sent if you are setting a new password as part of the update.

If you are not adding or updating a user, you can instead use the Email User ID and Email User ID and New Password options. With those option, you just need to click the appropriate button and the login information will be sent immediately. If you choose the Email User ID option, then only the User ID will be sent, and not their password. If you choose the Email User ID and New Password option, then the system will create a *new* password for that user and email it to them, along with their User ID. You

should be careful about using this option if the participant is having problems with logging in, as if you use this more than once, they'll have multiple emails in their inbox, each with a different password, and only the most recent email will contain their currently active password. This can cause confusion if they try to login using login information from an older email.

For participant accounts, there is an option Limited to Research Alternative Studies? that can be used to limit their study options to only studies marked as research alternatives. See the Limiting a Participant's Access to the System section for further information.

If you have a language in addition to English enabled on your site, then when viewing a participant's record, you will see which language they have chosen to use the system in. This is set when they login to the system, and the system uses this preference when generating emails to them, like a study reminder email. If this needs to be changed, the participant can choose a different language the next time they log in.

Adding Users

To add a user, choose the View and Edit Users option from the User Management menu. You will see a set of links to add a new user for each of the user types supported by the system. Choose the type of user you would like to add (for example, "New Researcher").

You will see a number of fields that vary depending on what type of user you are adding. Fields marked with (optional) are optional and may be left blank. Users can update many of the fields on their own, so you may choose to enter in only minimal data, and allow users to fill out the rest after they login.

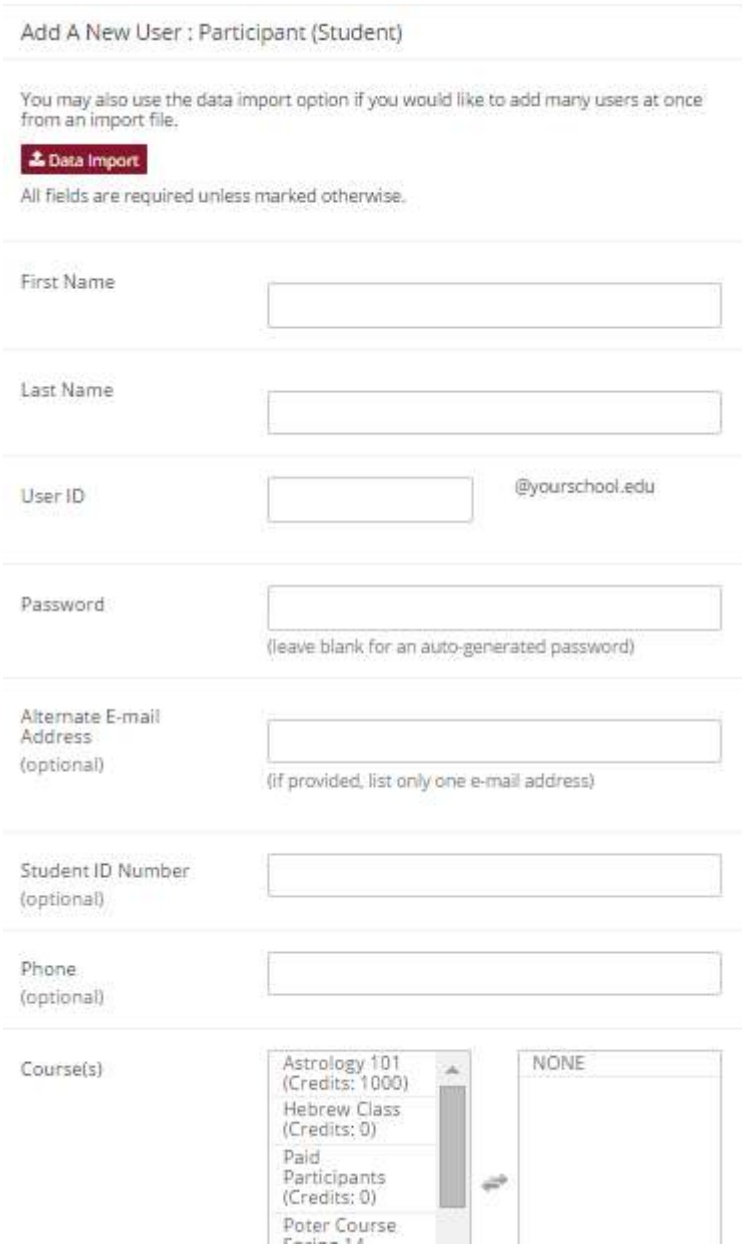


Figure 53 - Adding a New Participant

All users must have a password. If you would like the system to generate a random password for the user, simply leave the password field blank and a random password will be generated once the record is saved.

If you are adding a participant, you must specify at least one course which the participant is a member of. If your system is configured to allow participants to belong to multiple courses (see System Settings), then you may indicate more than one course a participant belongs to, where applicable. If this is a new system and you have not added any courses, you should do so first in the Course Maintenance section. If you choose “NONE” as their course selection, the participant will be prompted to select their courses upon their next login.

The alternate email address field is used to specify an alternate email delivery address for the user. If an email address is provided here, then emails to the user from the system (credit notifications, sign-up notifications, etc.) will be sent to the alternate email address. If this field is empty, an email will be sent to the address formed by adding the system-wide @ suffix (see System Settings) to the end of the user's User ID. If the user's User ID is "jsmith" and the @ suffix is "yourschool.edu", then the email would be sent to jsmith@yourschool.edu. You may provide only one alternate email address in this field. The alternate email address may be disabled for participants. See Emails and User IDs for more information.

If the "@ Suffix" (see System Settings) is blank, then the alternate email address (which is then labeled "Email Address") is mandatory. All emails for the user will go to this address. If you add a user and the email address is also used by another account on the system, you will be warned, but the system will allow it. This situation usually occurs when the same person has 2 user accounts, because they play multiple roles in the system.

The Admin. Comments field allows you to type in any special notes about the user. This field is only visible to the administrator and you may enter up to 255 characters.

When you are done entering information, click Save Changes and the user will be added. If you chose "Yes" for the "Email User with their Login Information" option, then they will be sent an email with their login information.

Deleting Users

The deletion of a user should be done very carefully and with great forethought. Deleting a user deletes all data associated with them. The effect of deleting the associated data can be quite disastrous. For instance, if you delete a researcher who owned 2 studies with many sign-ups, the researcher's studies, as well as all sign-up data, is also deleted. On top of that, if the study is deleted, then the detail about credits earned by participants for that study will also be deleted, making it very hard to track participant credit earnings correctly. Likewise, if you delete a participant then all data associated with them, including their sign-ups and online survey response data, will be deleted.

The system will provide a warning and some detailed information about the effects of deleting the selected user, and you should heed this warning. The system will prevent the deletion of a researcher or PI account where they have studies with signups that have credits linked to them, or studies with signups that are in the future or awaiting action.

There are few cases when you will need to delete an individual user, so use this feature carefully. Usually users are deleted in batch based on last login date or course enrollment. If you are worried about causing problems but want to prevent the user from using the system, you can instead update their record and set the "Login to System Allowed" value to No (see Editing Users).

Another option if you would really like to delete a certain researcher or PI, and they have studies linked to them, is to reassign those studies to a different researcher/PI and then delete the desired user since

they will no longer have any studies linked to them. You could even create a “dummy” account just for the purposes of holding these old studies.

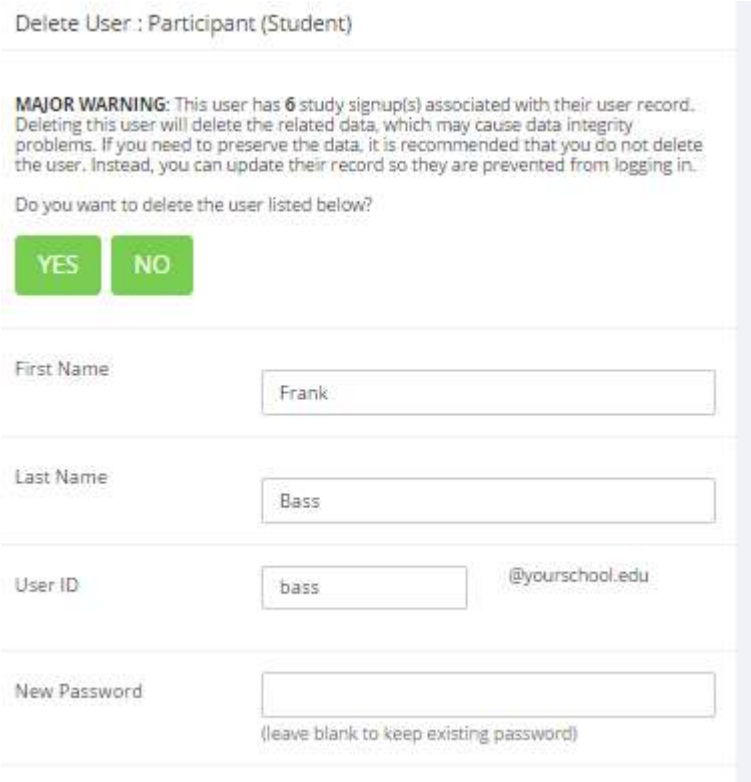

Delete User : Participant (Student)
MAJOR WARNING: This user has 6 study signup(s) associated with their user record. Deleting this user will delete the related data, which may cause data integrity problems. If you need to preserve the data, it is recommended that you do not delete the user. Instead, you can update their record so they are prevented from logging in.
Do you want to delete the user listed below?
YES
NO
First Name
Frank
Last Name
Bass
User ID
bass
@yourschool.edu
New Password
(leave blank to keep existing password)

Figure 54 - Deleting a User

If you still find it necessary to delete a user, locate them from the View and Edit Users menu, and choose the Delete User option. You will see a confirmation screen noting the effects of your deletion (if any), and you can choose Yes to proceed with the deletion.

You cannot delete yourself, but you can delete other administrator accounts.

If you want to delete a batch of users, most likely it is the end of the semester and you are looking to clear out old data. In this case, see the End-of-Semester Maintenance section, which provides various bulk deletion options.

If you would like to deactivate (but not delete) a set of user accounts, you can use the Batch Operations feature. A user who is deactivated cannot log in to the system, but all their data is retained.

Login Days Tracking

The system tracks the number of “login days” for each user, which is the number of unique days a user has logged in. For example, if a user logs in twice in one day, that will count only as one “login day” but if they login once on two consecutive days, that will count as two “login days.” The start and end of each day is determined by the time set in Current Time in System Settings, which should be the time where you are located, as opposed to the time where the servers are located.

This information is useful mostly for participants, to counter any claims they might have that they logged in every day and did not see any available studies, etc. This information can also be included on the Course Credit Report available to the administrator, and can be viewed when going to edit a user's record. For participants, this counter can be reset to 0 in End of Semester Maintenance.

Limiting a Participant's Access to the System

If you would like to allow a participant to log in, but restrict their ability to sign up for studies that are not research alternatives, one option is to set the "Limited to Research Alternative Studies?" setting for their account.

If this is set to Automatic (the default), then the system will make their account Limited only after they have accrued a specific number of unexcused no-shows (see No-Show Account Limit in System Settings).

The administrator may also manually set the account so that it is always Limited or never Limited.

If an account is Limited (either manually or automatically), then the participant may only sign up for studies designated as Research Alternative studies. This is a good way to limit the sign-ups for participants who should not participate in other research (either they have not consented, or they are too young to consent). It is also a good way to limit participants who have accrued excessive unexcused no-shows (see No-Show Handling). The administrator can mark any study in the system as a Research Alternative, and the option can be found when editing study information.

Removing a User's Access to the System

If you would simply like to prevent a user from logging in, but still preserve their data, the easiest way to do this is to update their record and set the "Login to System Allowed" value to No. You can re-enable their login at a later date if desired. See Editing Users for more information.

New Participant Account Message

For participants (and only participants), it is possible to specify additional information that is included in the email sent to a participant with their login information, when their account is created. Such an email is sent when the participant creates their own account, or when their account is created by the administrator, either using the batch import feature or when an individual account is created. Typically, such account text may contain special instructions or a pointer to additional information.

To set up such text, log in as an administrator and go to Mass Email and Announcements then Update System Text, and enter text in the appropriate section. If you would like to clear out any existing text there, simply delete it and save the changes. The changes will take effect immediately.

Bulk Email Usage

For all users except instructor and participant accounts (since those accounts do not have access to bulk email features), you can also see the bulk email usage history for the user when going to view their account, if any such information exists. The system tracks when a user uses one of the bulk email facilities in the system. The information is retained for 6 months, and can help to identify any cases of abuse of the feature. See Mass Email Reports for more information.

Principal Investigator (P.I.) Accounts

If the Principal Investigator option is enabled (see System Settings), then the system will support P.I. accounts. P.I. accounts have the full privileges of a researcher, for studies in which the user is listed as the P.I. The reason for P.I. accounts is in situations where the researcher runs the study on behalf of a P.I., but the P.I. would like to occasionally log in and monitor the study's progress. A typical scenario would be that the P.I. is a faculty member, while the researcher is a research assistant who actually conducts the day-to-day running of the study. The P.I. for a study does not receive email notifications for a study (for example, sign-up notifications) since that level of communication is more appropriate for researchers involved in day-to-day activities related to the study.

It should be noted that if you enable the P.I. option, every study *must* have a P.I. If you have a situation where only a few studies have P.I.s, create a dummy P.I. account so researchers can select that dummy P.I. as the P.I. of studies that don't otherwise have a P.I.

In some cases, it may be easier just to turn off the P.I. feature altogether, and list them as researchers.

Principal Investigator Timeslot Usage Limit

If the Timeslot Usage Restriction (see System Settings) is enabled and set to enforce on a per-P.I. basis, then principal investigators are limited in the amount of time they may use for scheduling timeslots. The default limit (in hours) is based on the Timeslot Usage Restriction Default (see System Settings), but this may be changed on a per-P.I. basis by editing their user record. Their current usage is listed when you update their record. You may also generate reports on P.I. time usage using the Time Usage Report (see Generating Reports).

Since researchers for a study have the same level of control as the principal investigator does, then researchers can view the usage for a study based on the principal investigator, and are forced to adhere to that limit.

The timeslot usage is computed by adding up all timeslots in the past where credit was granted or the signup is in awaiting action, then adding in the value of all future timeslots (regardless of credit status). Thus, it is possible for a P.I.'s usage to go *down* as time progresses, if their future timeslots are not used (i.e. participants do not sign up for them). Principal investigators and their researchers are reminded of their timeslot usage every time they go to add a timeslot.

Researcher Accounts

Researchers may choose to receive a daily reminder of the sessions they have scheduled for the following day. Researchers can adjust this setting on their own. The default value is set based on the Researcher Reminder Email setting (see System Settings). This email is sent once a day (if there is a reminder to be sent), immediately after participants are sent a reminder of the following day's studies (if such an option is enabled). The email is also sent if the researcher has any timeslots more than 2 days old that have not been dealt with. Researchers should still check into the system routinely, in case a participant signed up for (or cancelled) an appointment after the daily reminder email was sent.

Researcher Timeslot Usage Limit

If the Timeslot Usage Restriction (see System Settings) is enabled and set to enforce on a per-researcher basis, then researchers are limited in the amount of time they may use for scheduling timeslots. The default limit (in hours) is based on the Timeslot Usage Restriction Default (see System Settings), but this may be changed on a per-researcher basis by editing the researcher's user record. Their current usage is listed when you update their record. You may also generate reports on researcher time usage using the Time Usage Report (see Generating Reports).

The timeslot usage is computed by adding up all timeslots in the past where credit was granted or the signup is in awaiting action, then adding in the value of all future timeslots (regardless of credit status). Thus, it is possible for a researcher's usage to go *down* as time progresses, if their future timeslots are not used (i.e. participants do not sign up for them). Researchers are reminded of their timeslot usage every time they go to add a timeslot.

If timeslot usage limits are enabled on a per-researcher basic, then a study may not have multiple researchers (see Multiple Researcher Support in System Settings). The reason for this restriction is that if a study had multiple researchers, it would be difficult to determine if the full usage should be allocated to each researcher (resulting in double-counting), or evenly across each researcher, or based on researchers assigned to specific timeslots with the remainder assigned using another method. In short, it would be too complicated to deal with allocating usage to researchers in situations where there are multiple researchers for a study.

Administrator Accounts

You may have more than one administrator account in the system. All administrators have the same level of high privileges. Be careful who has an administrator account, and be sure administrator accounts have an extremely secure password. A secure password contains at least 8 characters, is a combination of letters and numbers, and is not used on any other system.

Administrator accounts have full privileges to the system. Not only can the administrator accomplish administrator tasks (importing users, running reports, changing system-wide settings, etc.), but the administrator can also accomplish all the tasks of a researcher. The advantage of this added researcher privilege is that an administrator can act as a researcher for monitoring purposes or other reasons. This need might arise if a researcher is out sick but there are participants who are waiting to receive credit

from the researcher. The administrator can easily act on behalf of the absent researcher and perform the necessary tasks.

Administrators should receive the proper training in handling sensitive data (to meet various regulatory requirements governing data), since they have access to all data in the system. See Regulatory Compliance for more information.

Participant Account Self-Creation

Overview

If the feature is enabled (see Participant Account Self-Creation in System Settings) to allow participants to create their own accounts, then this section applies.

Some schools choose to allow participants to sign up for their own accounts. If this feature is enabled, a link will appear on the front (login) page of the site to provide this facility.

This feature can exist as a supplement to importing participants from a data file and manually adding them, or it can be the only method of adding participant accounts. None of the methods of adding participants is mutually exclusive. Typically, a school may choose to use this self sign-up feature if a data import of the participant list is unavailable.

It should be noted that the self sign-up feature is only available for participant accounts, which usually make up the vast majority of user accounts in the system. Other types (instructors, administrators, researchers, etc.) of users may only be added through the user import or add user pages by the administrator, as then there is assurance that the administrator has actually reviewed that user's account and they are allowed access to the data in the system.

When a participant goes to the account self-creation form, they must provide very basic information, including their name, user ID, and choose which course(s) they are enrolled in. If the Student ID Requirement is set to Yes (see System Settings) and Student ID Deactivation is set to No (see System Settings), then participants must also provide their Student/University ID number. If Automatic Account Approval (see System Settings) is set to Yes, then participants will be emailed their password as soon as they submit their account request. If this value is set to No, then the administrator must approve accounts before they may log in.

If "@ Suffix" is provided (see System Settings), the key to authenticating a participant's validity is their user ID. A participant is notified of their password only after their account is approved by the administrator (or if it is automatically approved, based on the Automatic Account Approval system setting), and this approval email is sent to the email address derived from their user ID. Since only the "real" participant can check the email account for that user ID, this is a good method to ensure that the person applying for the account is who they claim to be. If a participant prefers to be contacted at an alternate email address, they can supply that only after their first login, by updating their profile (if alternate email addresses are enabled for participants – see System Settings).

If the participant supplies an invalid email address (usually just a simple typo), the email will bounce back to the administrator (the email address specified as Administrator Reply-To Email in System Settings), so the administrator can take corrective action. To reduce the chances of this, participants are required to enter their email address twice for verification.

If the "@ Suffix" is left blank, the user may select any user ID, but they must provide an email address as well. In this case, the administrator will need to verify that the person is allowed to use the system before approving the account, if Automatic Account Approval is disabled.

In either situation for the Automatic Account Approval setting, if Administrator Account Notification Email (see System Settings) is set to Yes, then the administrator will be notified by email when an account is requested. This notification email to the administrator will also include the IP address the participant was connected from when they requested the account, as well as a list of all other accounts in the system with the same name (first name and last name). The IP address information is not saved in the system, so if you want to keep track of this for future reference, be sure to save these emails. Sometimes this information can be useful to detect cases of participants creating multiple accounts using different email addresses, which is most common when paid studies are offered.

The Administrator Account Notification Email setting can be changed mid-term. Some organizations like to disable this at the start of the term, when they know many accounts are being requested and they just log on to the site every day to review these new accounts. Then they enable it after the initial rush, as they may not be on the site as often, to monitor for new account activity.

The form will provide the opportunity for the participant to select which course(s) they belong to, assuming there is more than one course marked as Selectable in the system (if there is only one Selectable course, there is no need to offer a selection – participants will be placed into that course automatically). Participants can change this course assignment later, if Course Reassignment (see System Settings) is enabled and they have not yet earned any credits. To adjust the list of courses and which courses are Selectable, go to Set Up | Course Listings.

The administrator may add additional text on the new account creation page to provide specific guidance to participants on creating accounts. This text is set in Create User Messages | Update System Text. See Updating System Text for more information.

When the participant is emailed their account information, any additional message the administrator has specified to be sent with new participant accounts will be included in the email. See Updating System Text for more information.

Automatic Account Approval

If Automatic Account Approval is set to Yes (see System Settings), participants are emailed their account information immediately after they request their account – with no administrator intervention required. As an administrator, you may monitor such activities by viewing the recent users report (User Management | View Recent Participants) to see the last 20 new participants and when their accounts

was created. You may also enable Administrator Account Notification Email (see System Settings), to receive an email notification every time an account is requested.

Approving Accounts

On the User Management toolbar section, there is an option labeled Approve New Participants (if Automatic Account Approval is set to No). Next to it will be listed the number of user accounts awaiting approval. Read over the basic information the participant provided, and approve or delete the account. There is also a space to enter any comments (this is optional), and these comments will be included in the email to the participant with their login information. If the account is approved, an email will be sent to the participant notifying them of the approval, and include login information (including their password) for the site, and their Unique ID code if the feature is enabled (see Participant Unique ID Codes). If the account is deleted, an email will *only* be sent if you included comments (usually the reason for account rejection). You also have the option to decide later about approving or deleting the account, in the event you are unable to make a decision immediately. If you would like to receive an email notification every time a new account awaits your approval (this is particularly useful in the middle of the term, when you may not be checking the site as often), enable the Administrator Account Notification Email setting (see System Settings).

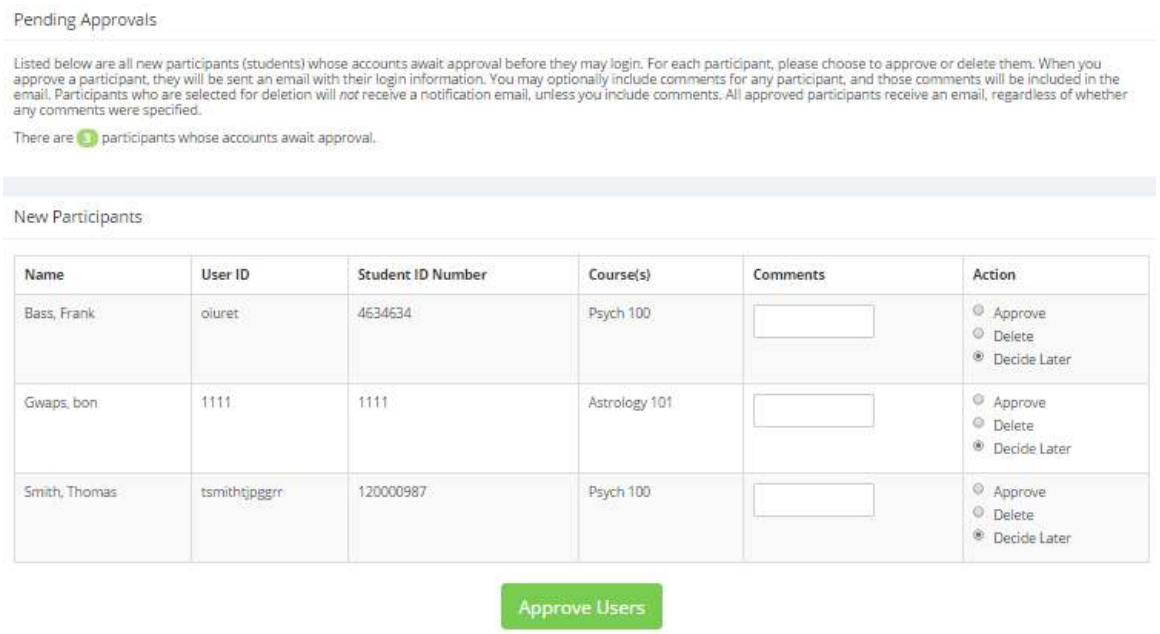

Pending Approvals
Listed below are all new participants (students) whose accounts await approval before they may login. For each participant, please choose to approve or delete them. When you approve a participant, they will be sent an email with their login information. You may optionally include comments for any participant, and those comments will be included in the email. Participants who are selected for deletion will not receive a notification email, unless you include comments. All approved participants receive an email, regardless of whether any comments were specified.
There are 3 participants whose accounts await approval.
New Participants
Name
User ID
Student ID Number
Course(s)
Comments
Action
Bass, Frank
oiuret
4634634
Psych 100
Approve
Delete
Decide Later
Gwaps, bon
1111
1111
Astrology 101
Approve
Delete
Decide Later
Smith, Thomas
tsmithtjpggrr
120000987
Psych 100
Approve
Delete
Decide Later
Approve Users

Figure 55- Approving New Users

Online Prescreening

Introduction

The system includes a rather extensive online prescreening feature. It allows you to set up a system-wide prescreen that participants must complete before they use the system. Researchers can restrict participation in studies based on prescreen results, and they may also view an individual participant's

prescreen responses (if enabled, see System Settings). Finally, the researcher may analyze prescreen responses in the aggregate (across all participants).

The online prescreen feature is rather complex due to the many features it contains. In addition, your ability to modify the prescreen after participants have started to take the prescreen (or after researchers have placed study restrictions based on prescreen responses) is quite limited. Because of this, you should plan out your prescreen well in advance, to make sure it is finalized before you make it available to participants. This is important to emphasize – you should plan the prescreen ahead of time, as your ability to change it once some participants have completed it is very limited.

Because the prescreen is system-wide and may involve questions from a variety of researchers, many organizations choose to plan out the prescreen on paper first (what questions and sections it will contain) before inputting it online in the system. There may be only one prescreen in the system.

If you want to allow researchers to set up their own sections in the prescreen, the easiest way to do this is to have them set up their own (inactive) online survey study, and you can then copy the appropriate sections from their online survey into the prescreen, once it is ready. See Copying a Section in this documentation for more information.

There is no concept of ownership of prescreen questions or sections, so even if one section of the prescreen contains questions from a specific researcher, all researchers have equal access to all questions and data from the prescreen. This means that any researcher can use any eligible question in the prescreen for study participation restrictions. It also means that if they are given access to prescreen data from participants that have signed up for their study, then they get access to all prescreen responses for those participants (see Prescreen Viewing in System Settings). For this reason, it is useful to take a holistic view of the prescreen and also look closely at the questions researchers would like to add. It is often the case that two researchers will want to add the same or similar questions to the prescreen, so those questions can be consolidated to avoid duplication.

A prescreen may have an unlimited number of sections and an unlimited number of questions per section, though we recommend limiting the prescreen to fewer than 300 total questions and 15 sections, to reduce participant fatigue and improve system performance. Participant fatigue can be an issue since the participants must complete the prescreen all at once.

Another important reason to keep the prescreen size manageable is that the prescreen size has the greatest effect on system performance. The larger the prescreen (and in particular the number of responses collected), the more likely this will have a negative effect on system performance.

Questions may be free-entry (requiring the participant to type in an answer) or multiple-choice (pick only one or pick many from the list of choices). You may also specify that the system computes a participant's results for an entire section, as either a section sum or average score. This computed sum or average can be computed only for numeric, multiple-choice (pick only one) questions in the section. It is useful in situations where you want to restrict participation based on the average of a participant's responses to a section, to account for one or two outlying responses that still fall within the adequate

range when the participant's entire response set is considered. It is also useful when a participant's aggregate score is more important, such as with a depression battery.

For free-entry questions where the participant is asked to enter a free-form text answer, the size of the entry field (as it is displayed) can be changed in length (display width) only. Participants may enter up to 255 characters for their response, regardless of the display length of the question.

Studies can be restricted so that only participants providing certain responses (or with certain section average/sum scores) may participate in the study. Participants are unaware that such restrictions are in place – the system will simply not show participants studies for which they are ineligible due to prescreen restrictions. Studies can only be restricted based on multiple-choice (numeric or non-numeric) questions that allow for only one choice to be selected. A study can be restricted by one question or a set of questions, and to a specific response or set of responses for each question.

Researchers are provided with a facility to analyze any prescreen question response in aggregate (across all participants), to help them in placing their study restrictions (if Prescreen Aggregate Viewing is enabled, see System Settings). For instance, a researcher may want to choose the top 25% of participants (a percentile restriction), but is unsure what responses constitute the top 25% until the responses are analyzed. If enabled, researchers can also view all of a specific participant's responses for the prescreen, if that participant has signed up for the researcher's study. They may also contact a group of participants who meet their specified criteria, to invite them to participate in one of their studies. The contact feature is only enabled for researchers from the Analyze Prescreen Responses page if Prescreen Contact and Prescreen Aggregate Viewing (see System Settings) are enabled. If only the Prescreen Contact setting is enabled, then researchers may contact qualified participants when setting up prescreen participation restrictions for their own study only. You should consult with your IRB before enabling this setting, as some IRBs are concerned that contacting participants and inviting them to participate in a specific study may be coercive. There is also a setting so the administrator can automatically receive an email copy of any communication sent to participants via this contact method (see Prescreen Contact Admin CC. in System Settings), to monitor the content of such invitations. Finally, the first sentence or two of such emails are logged, and can be viewed in the Mass Email report.

Sections can be displayed in a specified order or random order, or a combination of both. Every section may contain introductory text introducing the section, and the prescreen itself may also have introductory text introducing the prescreen, as well as closing text that is displayed upon completion of the prescreen. You may specify that questions within a section are displayed in random order. If you do not specify random ordering for questions in a section, then the questions will be displayed (in each section) in the order they were entered and cannot be reordered later. Multiple choice questions can have their choices displayed in the entered order or random order (this is specified on a per-question basis). Multiple choice question choices can be displayed horizontally (across the page) or vertically (down the page).

For information specifically on restricting study participation based on prescreen results or analyzing and viewing prescreen responses, please see the Researcher documentation.

Privacy Protections

You may configure the prescreen so that a participant may opt out of it. You may also configure each question (on a per-question basis) so that participants may opt out of answering the question. If anonymous identification is enabled (see Participant Identification in System Settings), participants are only identified to researchers with a unique numeric ID code.

Prescreen Participation Credits

When you set up the prescreen, you may specify the number of credits a participant will earn for completing the prescreen, and also the number of credits they earn for declining to participate in the prescreen (if they are allowed to opt out of it). If participants are allowed to assign credits to a specific course (see Course Credit Assignment in System Settings), they are also prompted to choose which course they would like to assign their credit to, before they may finish the prescreen. Prescreen credits are counted as non-study credit grants in the system.

If you do not want to offer credit for the prescreen, simple set the value(s) to 0 when you set up the prescreen.

It is not required that participants earn credit for prescreen participation. Keep in mind the prescreen is presented to a participant the first time the log on, before they can see studies. Thus you can generally assume that all participants have visited the prescreen by the time they really start to use the system (the exception is if the Prescreen/Online Concurrent Survey Limit in System Settings is reached when they log in, in which case they will be asked to take the prescreen the next time they log in). Working on this assumption, many schools choose just to lower the default credit requirements for all users by the amount they would ordinarily grant for prescreen participation.

Creating or Modifying the Prescreen

To work with the prescreen, log in as an administrator and go to Set Up | Prescreen Setup on the top menu bar. If there is an existing prescreen in the system, you will be given the opportunity to modify it or delete it and create a new prescreen. For more information about deleting the prescreen, see Deleting a Prescreen.

It is important to note that while you are making changes to the prescreen, it is deactivated so participants may not take the prescreen. When you go to the Final Review option after you have finished your work with the prescreen, you will have the opportunity to save your changes and make the prescreen active (available to participants) or inactive (not available to participants). If a participant who has not completed the prescreen logs in and the prescreen is inactive, they can still use the system as usual and sign up for studies available to them. On their next login when the prescreen *is* active, they will be taken to the prescreen. You should always choose the Final Review option when you finish your work with the prescreen, as the system saves all changes and computes some other important data when you finalize the prescreen. If you would like to continue work on the prescreen at a later date, you should still choose the Finalize Prescreen option to ensure your changes during the current session are properly saved (most likely you would choose to keep the prescreen inactive in this situation).

The prescreen is only available to participants if it is marked Active in the prescreen setup. So, if you want to just work on the prescreen or perhaps just not use it for a semester, your best option is to make the prescreen inactive for that period of time. The other option (turning it off in System Settings) may not be ideal as you then have no way of setting up the prescreen if the feature is turned off.

General Prescreen Information

Choose the General Information option (if creating a new prescreen, this is the first page you will see) to provide some basic information about the prescreen. The fields are explained below:

Field	**Description**
Introductory Text	Optional, maximum 10,000 characters. Provide a set of text that will be displayed before a participant starts the prescreen. If you allow participants to opt out of the prescreen, this text will be displayed on the page that allows them to opt out, so you might want to include any information about why a participant may or may not want to opt out. If you need informed consent for the prescreen, you'd place the text in this field. You may include HTML in this area, but please be sure you know what you are doing. If you would like to add a carriage-return (paragraph break), simply type in "<p>" (without the quotes). When you first create the prescreen, the system will automatically insert some basic default text in this area. You may change any of this text as much as you like – the system will not change it back later as long as you save your changes. The default text is in English, so you can instead provide text in another language if necessary You may view how this text is displayed to participants by saving it, then going to Preview Introductory Text, which is available from the Section List page.
Closing Text	Optional, maximum 7,000 characters. Provide a set of text that will be displayed after the participant has finished the prescreen and saved all their responses. This is a great place to include any relevant debriefing information. You may include HTML in this area, but please be sure you know what you are doing. If you

	would like to add a carriage-return (paragraph break), simply type in “<p>” (without the quotes). You may view how this text is displayed to participants by saving it, then going to Preview Closing Text, which is available from the Section List page.
Display sections in random order?	You may specify a specific ordering for sections, have the system randomize the order for all sections, or specify the order of some sections, and a random order for other sections. If you specify the order for only some sections, you may also specify, for each section, whether it should be displayed before or after the random-ordered sections. The system does not track the order sections were displayed for each participant.
Mobile Devices Allowed?	If set to Yes, then participants accessing the system using the mobile version (app) on a mobile device like a smartphone or tablet will be allowed to participate. If the prescreen makes use of images, or question and choice layout is very important, then it may be better to set this to No as the layout may be rendered differently on devices, especially smartphones with small screen sizes. For technical reasons, there is no easy way to preview how questions will look on a mobile device except to log in as a test participant using an actual mobile device.
Participant response review/change	If set to Yes, then participants may review and change their responses just before they complete the prescreen. They are given this opportunity after they complete the last section of the prescreen, and before any closing text is shown. At this point, they can see all their responses and go back to any section to change their responses. Once they complete the prescreen, they cannot go back at a later date and change any responses. It may be useful to set this option to No (so that they

	are not allowed to review or change their responses at the end of the prescreen) if sections are somehow dependent on one another, such that allowing participants to change their responses may affect the integrity of data collection.
Participant Retake Date	If specified, then if the participant has already completed the prescreen but their responses are older than (or the same as) the date specified, then they will be asked to take it again. This is useful to ensure that the prescreen data does not get outdated, while only deleting a participant's old prescreen data if they complete the prescreen again. If a participant previously opted out of the prescreen, they will not be taken to complete the prescreen again even if they opted out before the specified date, for ethical reasons. If they decide they would like to complete the prescreen, they can go to My Profile and the option will be there. If this feature is enabled, it should be set to a date in the past and not the future.
Can participants choose to opt-out of the prescreen?	If set to Yes, participants may opt out of participating in the prescreen. They may take it at a later time (through a link on their My Profile page).
How many credits should a participant receive for completing the prescreen?	Enter a number indicating how many credits the participant will receive for completion of the prescreen. If they should not earn credits for completing the prescreen, enter the value "0".
How many credits should a participant receive if they choose to opt-out of the prescreen?	Enter a number indicating how many credits the participant will receive for declining to participate in the prescreen. If they should not earn credits for declining to participate in the prescreen, enter the value "0". This value only applies if participants are allowed to opt-out of the prescreen.

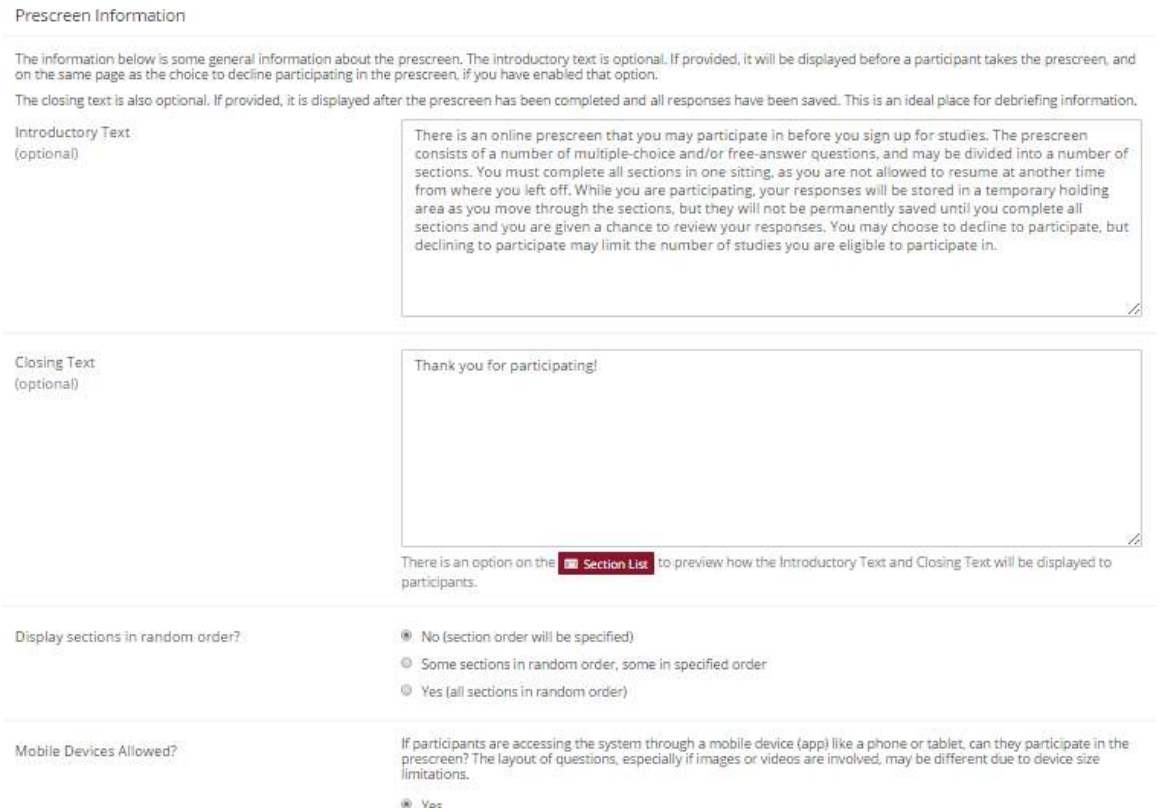

Prescreen Information
The information below is some general information about the prescreen. The introductory text is optional. If provided, it will be displayed before a participant takes the prescreen, and on the same page as the choice to decline participating in the prescreen, if you have enabled that option.
The closing text is also optional. If provided, it is displayed after the prescreen has been completed and all responses have been saved. This is an ideal place for debriefing information.
Introductory Text (optional)
There is an online prescreen that you may participate in before you sign up for studies. The prescreen consists of a number of multiple-choice and/or free-answer questions, and may be divided into a number of sections. You must complete all sections in one sitting, as you are not allowed to resume at another time from where you left off. While you are participating, your responses will be stored in a temporary holding area as you move through the sections, but they will not be permanently saved until you complete all sections and you are given a chance to review your responses. You may choose to decline to participate, but declining to participate may limit the number of studies you are eligible to participate in.
Closing Text (optional)
Thank you for participating!
There is an option on the Section List to preview how the Introductory Text and Closing Text will be displayed to participants.
Display sections in random order?
No (section order will be specified)
Some sections in random order, some in specified order
Yes (all sections in random order)
Mobile Devices Allowed?
If participants are accessing the system through a mobile device (app) like a phone or tablet, can they participate in the prescreen? The layout of questions, especially if images or videos are involved, may be different due to device size limitations.

Figure 56 - Prescreen General Information

Section List

Depending on if you are adding or editing the prescreen, you will be taken to the list of sections for the prescreen. Here, you can change the order that sections will be displayed (if you have not enabled full random section ordering for the prescreen), and see a quick review of each question. From here, you can add a question to any section and edit any question. To add a new section, choose the Add a New Section choice at the bottom of the page.

If you have enabled partial random section ordering, then you can specify a section order for the sections you would like to be displayed in a specified order. For the sections you would like to be displayed in random order, leave the Section Order area blank. When you specify a section order, use each number once, and use the numbers 1-98 if you would like the section to be displayed *before* the random-ordered sections, and the numbers 100-199 if you would like the section to be displayed *after* the random-ordered sections. Be sure to use each number only once, or leave the number blank to make the section part of the random-ordered sections. Sometimes it is useful to use partial random ordering if you want to ask basic (e.g. demographic) information in the first few sections, while asking more analytical questions in the random-ordered sections. Likewise, you may want to ask about the previous random-ordered sections after they are completed.

If a question is eligible for prescreen participation restrictions (i.e., it is a multiple choice question where only one choice may be chosen), then there will be a Study Restrictions link where you can see

which studies are using this question for prescreen participation restrictions. This information is helpful in the event you want to delete the question, as you see which studies (if any) will be affected by doing so.

There is also a Preview Section option so you may preview each section of the prescreen as participants will see it.

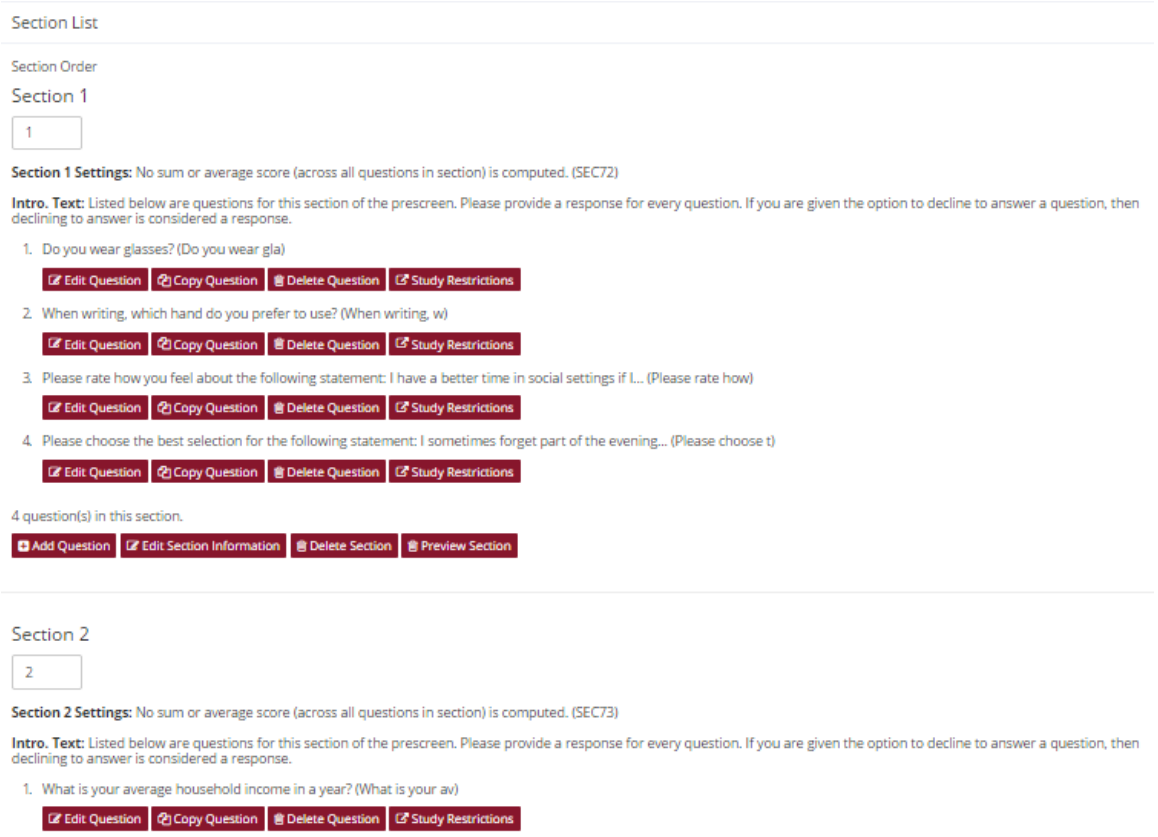

Section List
Section Order
Section 1
1
Section 1 Settings: No sum or average score (across all questions in section) is computed. (SEC72)
Intro. Text: Listed below are questions for this section of the prescreen. Please provide a response for every question. If you are given the option to decline to answer a question, then declining to answer is considered a response.
1. Do you wear glasses? (Do you wear gla)
Edit Question
Copy Question
Delete Question
Study Restrictions
2. When writing, which hand do you prefer to use? (When writing, w)
Edit Question
Copy Question
Delete Question
Study Restrictions
3. Please rate how you feel about the following statement: I have a better time in social settings if I... (Please rate how)
Edit Question
Copy Question
Delete Question
Study Restrictions
4. Please choose the best selection for the following statement: I sometimes forget part of the evening... (Please choose t)
Edit Question
Copy Question
Delete Question
Study Restrictions
4 question(s) in this section.
Add Question
Edit Section Information
Delete Section
Preview Section
Section 2
2
Section 2 Settings: No sum or average score (across all questions in section) is computed. (SEC73)
Intro. Text: Listed below are questions for this section of the prescreen. Please provide a response for every question. If you are given the option to decline to answer a question, then declining to answer is considered a response.
1. What is your average household income in a year? (What is your av)
Edit Question
Copy Question
Delete Question
Study Restrictions

Figure 57 - Prescreen Section List

Adding or Modifying a Section

To add a new section, go to the Add New Section section at the bottom of the Section List page. To modify an existing section, choose the Edit Section Information link next to the section you would like to modify, from the Section List page.

There are three pieces of information you may provide for each section. First, you may specify some introductory text to be displayed at the beginning of the section. When participants take the prescreen, they view one section at a time, and all the questions in that section. The introductory text may be helpful in explaining the purpose or topic of the questions in that section. You may include HTML in this area, but please be sure you know what you are doing. If you would like to add a carriage-return (paragraph break), simply type in “<p>” (without the quotes). The introductory text is limited to 15,000 characters.

You may choose if the questions for that section are displayed in random order or the order they are entered.

You may also choose to have the system compute a section sum or average (for each participant) for the section. These scores are computed only for all the multiple-choice, numeric questions in a section, where only one choice may be chosen. Think carefully about setting this value, because you are very limited in your ability to change it after participants have started to take the prescreen or study restrictions have been placed based on the prescreen.

The advantage of a section sum or average is that researchers may choose to restrict their studies based on this, instead of an individual response in the section. Often this is useful when all the questions are using a unidimensional scale (1-5, for example), but a participant's average score response to the section is more useful to account for their outlier responses.

Depending on if you are editing or adding a section, after you save your changes, you will be taken to a page to add a new question or to the section list.

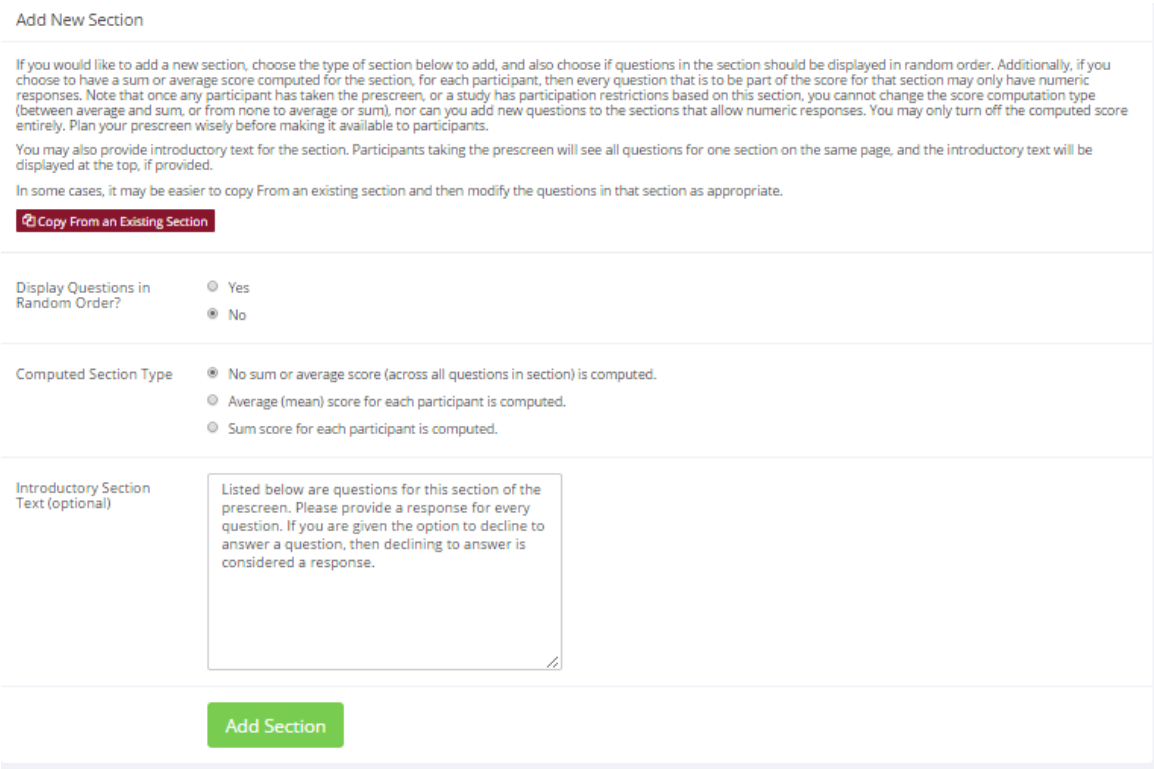

Add New Section
If you would like to add a new section, choose the type of section below to add, and also choose if questions in the section should be displayed in random order. Additionally, if you choose to have a sum or average score computed for the section, for each participant, then every question that is to be part of the score for that section may only have numeric responses. Note that once any participant has taken the prescreen, or a study has participation restrictions based on this section, you cannot change the score computation type (between average and sum, or from none to average or sum), nor can you add new questions to the sections that allow numeric responses. You may only turn off the computed score entirely. Plan your prescreen wisely before making it available to participants.
You may also provide introductory text for the section. Participants taking the prescreen will see all questions for one section on the same page, and the introductory text will be displayed at the top, if provided.
In some cases, it may be easier to copy From an existing section and then modify the questions in that section as appropriate.
Copy From an Existing Section
Display Questions in Random Order?
Yes
No
Computed Section Type
No sum or average score (across all questions in section) is computed.
Average (mean) score for each participant is computed.
Sum score for each participant is computed.
Introductory Section Text (optional)
Listed below are questions for this section of the prescreen. Please provide a response for every question. If you are given the option to decline to answer a question, then declining to answer is considered a response.
Add Section

Figure 58 - Add New Section

Adding or Editing a Question

To add or edit a question, choose the appropriate choice from the Section List, next to the desired section. Questions will be displayed to participants in the order they are added to the section, or in a random order, depending on the section settings. Questions cannot be reordered after they are added, so this should be planned carefully. Depending on the state of the section and if participants have

taken the prescreen, some options will be automatically set for you, and not changeable. All fields must be filled out.

Field	Description
Question Text	The text for the question. This will be displayed above each question's choices. Maximum 15,000 characters.
Abbreviated Question Name	A 15-character label for the question. This is not displayed to participants and is used to name the columns that appear when the data is exported in CSV format. Many statistical analysis programs limit column names to 15 characters.
Question Type	Multiple Choice (select one), Multiple Choice (select many) or Free Entry. If the section has a computed average or sum, you may be limited in your ability to add Multiple Choice (select one) non-numeric questions. Free entry choices may contain a response up to 255 characters in length. Studies may not be restricted on free-entry choices or multiple-choice (select many) questions, but a participant's responses to all question types are listed when viewing a participant's prescreen responses.
Display length of Free-Entry field	Specifies the length (size) of a free-entry field when it is displayed. Acceptable values for this setting at 5-85, and the field will always allow participants to type in up to 255 characters. The height of the field cannot be adjusted, and this setting only applies to Free Entry questions.
Display choices in random order?	If set to Yes, the choices for this question will be displayed to participants in a random order. This option only applies to multiple choice questions.
How should the choices be displayed?	Horizontal (across the page) or vertical (down the page) are the two options for how the choices for a multiple-choice question should be displayed. Often, the horizontal display is effective when the question involves a scale. This setting applies only to multiple-choice questions.

Can participants decline to provide an answer for this question?	If set to Yes, participants will see a choice below this question that allows them to opt out of answering the question. If set to No, they must answer the question. The default when adding a new question (not copying an existing question or section) is set to Yes for ethical compliance.
Are all choices numeric?	If set to Yes, all choices must be numeric whole numbers (e.g. 1, -2, 10). This only applies to multiple choice questions. Studies may be restricted based on numeric or non-numeric multiple choice questions, however sections with a computed section sum or average may not contain non-numeric multiple choice questions.
Display numeric value?	If set to No, the numeric value of the choice is not displayed to participants. This only applies to numeric, multiple-choice questions where each choice includes both a numeric value and associated text (e.g. “5 Strongly Agree”). This is useful when running a reverse scale.

If the question is a multiple choice question, you must also fill out the choices section that is part of the same form. A minimum of 1 choice must be provided for the question. Each choice may be up to 255 characters in length. If the question is specified as numeric, you must provide a numeric choice, and that choice must be a whole number (e.g., -5, 1, 0, 349 but not 0.5 or 2.75). If you would like to provide descriptive text to accompany each numeric choice, you may do so by typing in the numeric choice and leaving one blank space after it, then typing in the descriptive text, for example: “5 Strongly Agree”. If you provide descriptive text along with the numeric choice, then you have the option of hiding the numeric value from participants, by choosing No to the “Display numeric value?” setting for the question. This is useful in reverse scale or other situations where the numeric value for the choices does not need to be displayed to the participant.

If you add a question to the prescreen, and some participants have already completed the prescreen, they will *not* be asked to answer the additional questions upon their next login. However, participants who have not already completed the prescreen will be shown the latest version of the prescreen, with any new questions also displayed. Because of this, you should plan the prescreen carefully and avoid adding questions after some participants have already completed the prescreen. See the Participant Retake Date option in General Prescreen Information for another way to handle this situation.

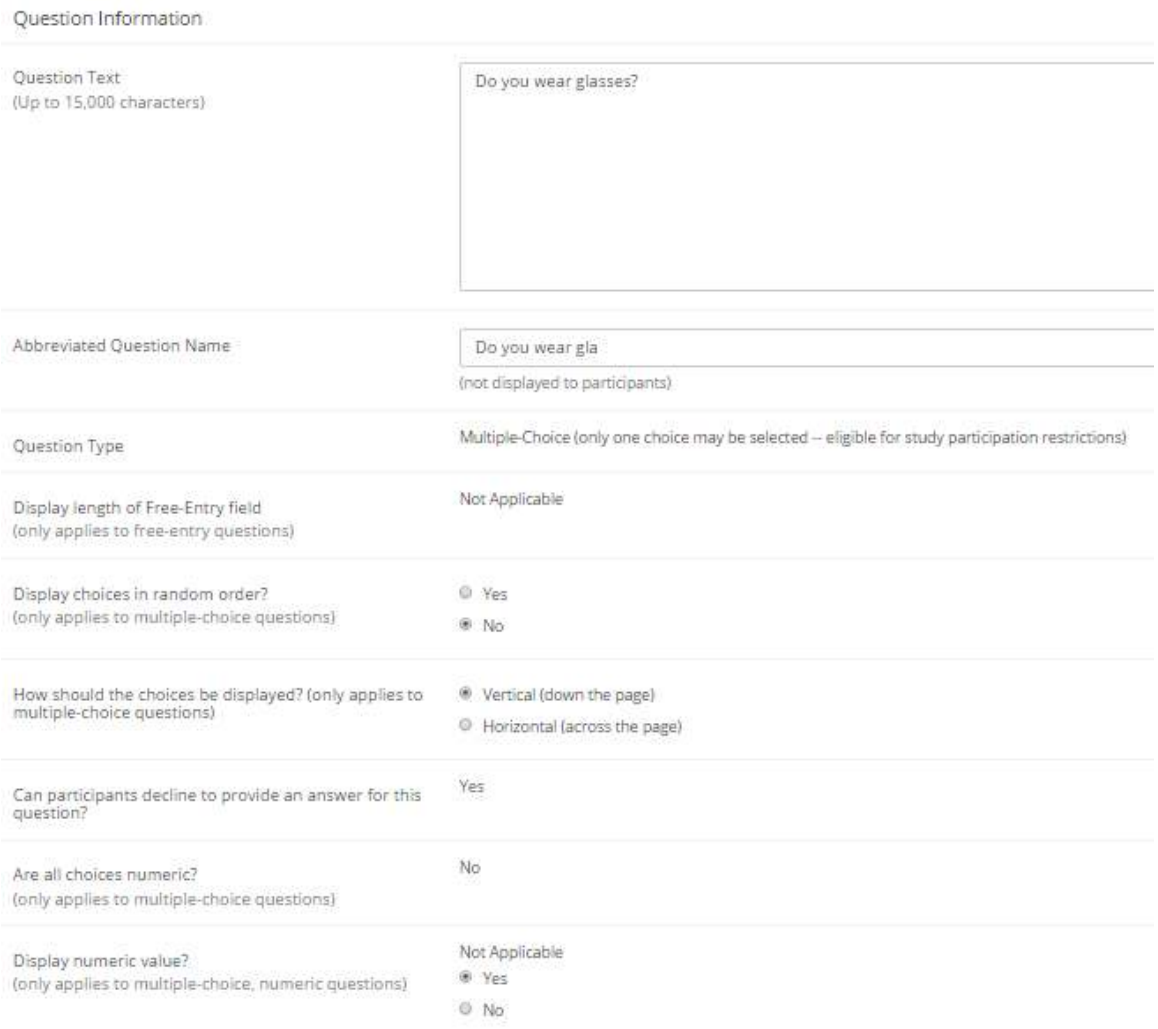

Question Information
Question Text
(Up to 15,000 characters)
Do you wear glasses?
Abbreviated Question Name
Do you wear gla
(not displayed to participants)
Question Type
Multiple-Choice (only one choice may be selected -- eligible for study participation restrictions)
Display length of Free-Entry field
(only applies to free-entry questions)
Not Applicable
Display choices in random order?
(only applies to multiple-choice questions)
Yes
No
How should the choices be displayed? (only applies to multiple-choice questions)
Vertical (down the page)
Horizontal (across the page)
Can participants decline to provide an answer for this question?
Yes
Are all choices numeric?
(only applies to multiple-choice questions)
No
Display numeric value?
(only applies to multiple-choice, numeric questions)
Not Applicable
Yes
No

Figure 59 - Edit a Question

Copying a Section

You may copy a section from any online survey in the system into the prescreen, by choosing Copy From an Existing Section in the Section List. You will see a list of eligible surveys to copy from. After you choose which survey to copy from, you will see a list of eligible sections in that survey. Once you choose a section, it will be copied into the prescreen you are currently editing.

The administrator may also use the same facility when editing an online survey, to copy a section from the prescreen into an online survey. This can be useful to archive prescreen sections into a "holding" survey. Likewise, it may be useful to have researchers set up their own sections in a separate online survey, then copy that into the prescreen.

Copying a Question

For multiple-choice questions, it is often the case that many questions have the same measures (choices). To make entry of similar questions easier, you may use the Copy Question feature to copy a

question. Such an option is only available for multiple choice questions. To copy a question, select the question you would like to copy (when viewing the Section List). You will then be taken to a list of sections where you may copy this question to (the default is set to the section the question came from). After you decide which section you would like to copy the question to, you will be taken to a page where you can make any final changes to the copy of the question before saving it.

Saving Your Changes

When you are done, you should go to the Final Review and save your changes. Even if you plan to do further editing on the prescreen later, it is **imperative** that you go to the Final Review step, as the system needs to save certain special changes and make some computations. If you do not want participants to take the prescreen yet, you can save changes but keep the prescreen inactive. When you save your changes, it may take a moment to save all the changes, as the system is performing a number of computations on the prescreen. Please be patient, as these computations are done to make performance for participants and studies as fast as possible. The system tracks which user last made the prescreen active or inactive and when they did this, and this is displayed on the Prescreen Setup page.

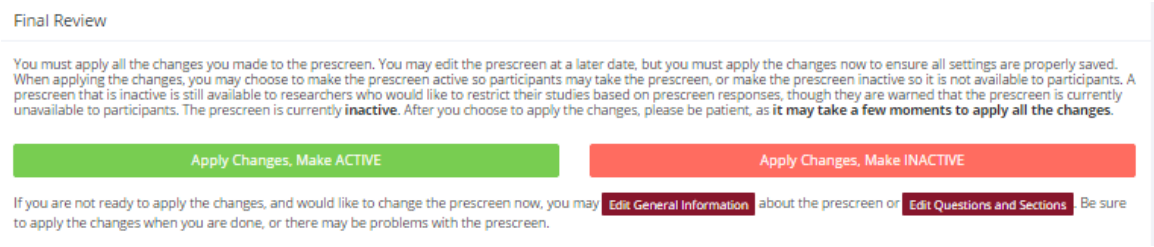

Final Review
You must apply all the changes you made to the prescreen. You may edit the prescreen at a later date, but you must apply the changes now to ensure all settings are properly saved. When applying the changes, you may choose to make the prescreen active so participants may take the prescreen, or make the prescreen inactive so it is not available to participants. A prescreen that is inactive is still available to researchers who would like to restrict their studies based on prescreen responses, though they are warned that the prescreen is currently unavailable to participants. The prescreen is currently inactive. After you choose to apply the changes, please be patient, as it may take a few moments to apply all the changes.
Apply Changes, Make ACTIVE
Apply Changes, Make INACTIVE
If you are not ready to apply the changes, and would like to change the prescreen now, you may Edit General Information about the prescreen or Edit Questions and Sections. Be sure to apply the changes when you are done, or there may be problems with the prescreen.

Figure 60 - Saving Prescreen Changes

Viewing the Prescreen as a Participant

If you would like to see how the prescreen will be displayed to participants, that can easily be done while setting up the prescreen. Next to each section (in the section list), there will be a Preview Section link so you can view the section exactly as participants would see it. You may also view how the introductory and closing text will appear to participants, by choosing the Preview Introductory Text and Preview Closing Text options which appear on the Section List page.

Participants will see a basic progress display on the top right corner of each page, listing the section they are on (ordinal counting), and how many sections total are in the prescreen (excluding the Admin. Section, if there is one). When using Preview Section, you will see this progress display as well, except the current section number will appear as “X” in preview mode since it is not an actual participant taking the prescreen (and randomization of section order may be involved).

Admin Section

Introduction

In some cases, it may be useful to provide responses on behalf of a participant, with the goal being to use those responses as the basis of prescreen participation restrictions on a study. For example, there

may be a special computation scale (too complex for the system to calculate with existing section sum/mean computations) based on a participant's responses that is useful to determine who can participate in a study.

The main idea here is that the administrator can set up and then insert responses on a participant's behalf, with the goal of using those to restrict participation in studies. This feature can be very powerful because of its flexibility. For example, let's say there is a new method of grouping participants, potentially unrelated to the prescreen responses they provide (perhaps they are divided into random sub-groups, for example). The administrator could easily insert this data as prescreen responses in the admin section. Such data can *only* be inserted for questions in the admin section.

Because this section is intended for use in setting up study prescreen participation restrictions, it has some restrictions. First, only multiple-choice questions where only one choice may be chosen can be added into this section (since those are the only types of questions that can be used for prescreen participation restrictions). Second, this section is *never* visible to participants. Rather, it is a special section only visible to the administrator and researchers, and is considered part of the participant's prescreen responses. Like other multiple-choice (pick one choice) questions on the prescreen, questions in the admin section are eligible for study prescreen participation restrictions. Finally, prescreen responses can be inserted only for those who have successfully completed the prescreen.

Prescreen responses may be uploaded in a batch so that the responses for one question can be uploaded on behalf of many participants at once. It is not possible to insert responses for participants who have opted out of the prescreen.

This feature is intended for advanced users, as it may require skills in how to handle data sets (for importing responses). Please consult with your IT experts if you have difficulty assembling the data in the proper format.

Creating the Admin Section

The prescreen can have only one admin section. To create it, choose the Add Admin Section option that appears on the Section List page (at the bottom). If this option is not there, then an Admin Section has already been created and you should see it in the section list, noted as such. You may not create the admin section by copying an existing section.

Once the section is added, you can add questions just like with any other section. The only restriction is that you may only add multiple-choice questions where only once choice may be chosen. Because of this, you will be limited in your ability to copy questions from other sections, if those other questions are not of that question type.

Inserting Responses into the Admin Section

You may only insert responses on behalf of participants who have completed the prescreen, and only for questions in the admin section. To do so, go to Prescreen Setup | Upload Prescreen Responses. Going here will not take the prescreen offline, so it is not a problem to do this while the prescreen is active.

You can upload data for only one question at a time. Choose the desired question and the system will give a list of acceptable responses for that question, and the format it expects for the data. In terms of the format, on a single line you may separate the data by a comma or a blank space, but not both. Generally, the format is user identifier (User ID or Anonymous ID Code), then a space or comma, and then the response, with one participant's response per line.

Once you click Proceed, the system will process the data you provided and provide information regarding if the data provided was acceptable. You then have the option to change the data, or proceed and it will insert the data.

You may upload responses for the same participant for the same question more than once – the latest response will override any previous responses, and only the latest response will be stored.

Download Prescreen Response Data

The Download Prescreen Responses option appears on the Prescreen Setup menu, and such an option does *not* take the prescreen offline. For information about the download options, see Analyzing Survey Responses in the researcher section of the documentation (Online Survey Studies section) as the functionality is the same. The only difference is that in some system configurations, the administrator may see more identifying information (like participant names) than a researcher does when they download data. If you are concerned about what identifying information researchers may see when downloading prescreen responses, login with a researcher account to see exactly what they will see.

Deleting Prescreen Restrictions

If studies have participation restrictions linked to prescreen questions, this can hinder the ability to modify or delete that prescreen question. Go to Prescreen Setup | Delete Prescreen Restrictions to delete all prescreen restrictions across all studies in the system. This will not delete the studies nor the prescreen questions. Only the prescreen restrictions will be deleted, and researchers can add them again later.

Deleting a Prescreen

At the end of the term, you may want to delete the prescreen and all relevant data. The option appears in System Maintenance and Data Management | End-of-Semester Maintenance, and also in the Prescreen Setup. You should use this option carefully. Deleting a prescreen also deletes all participant prescreen responses, and removes any study prescreen restrictions. This may result in unqualified participants being able to sign up for restricted studies. You may also use the Data Export option (found in the System Maintenance and Data Management section) to save all relevant prescreen information for archival or later analysis.

If you would like to delete a specific participant's prescreen responses, the option is available when editing the participant's record.

If you would like to keep the prescreen intact, but merely delete all participant responses (this is often done at the end of the term), choose the Delete All Prescreen Responses option in End-of-Semester Maintenance. Any credit earned for completing the prescreen will be retained. The next time the participant logs in, they will be asked to complete the prescreen again (assuming the prescreen is available). This option also makes it easy to modify the existing prescreen in preparation for the upcoming term, since there is a lot of flexibility in modifying the prescreen if no responses have been collected. See the Participant Retake Date option in General Prescreen Information for another way to handle this situation.

Generating Reports

Overview

The Reports section is accessed by an administrator by choosing the Generate Reports option from the Tasks toolbar. These reports provide various information on participant credit completion and participant participation status, as well as some information about researchers and studies. If you choose to create Instructor logins and assign Instructors to Courses, the Instructors can generate their own Credit Completion reports and you as an administrator may not need to use the Reports feature for that purpose, but the other reports may be quite useful in monitoring the pool. Most reports can be viewed on-screen, or exported in CSV (comma-separated) format, for import into popular spreadsheet programs like Excel. Most reports also have a printer-friendly format for easy printing.

If you choose to print the reports, and you find the formatting is too wide for the page, you can change the printing format from Portrait to Landscape. This change is made in your web browser, as part of the print options, and you can ask your IT department for more help with this.

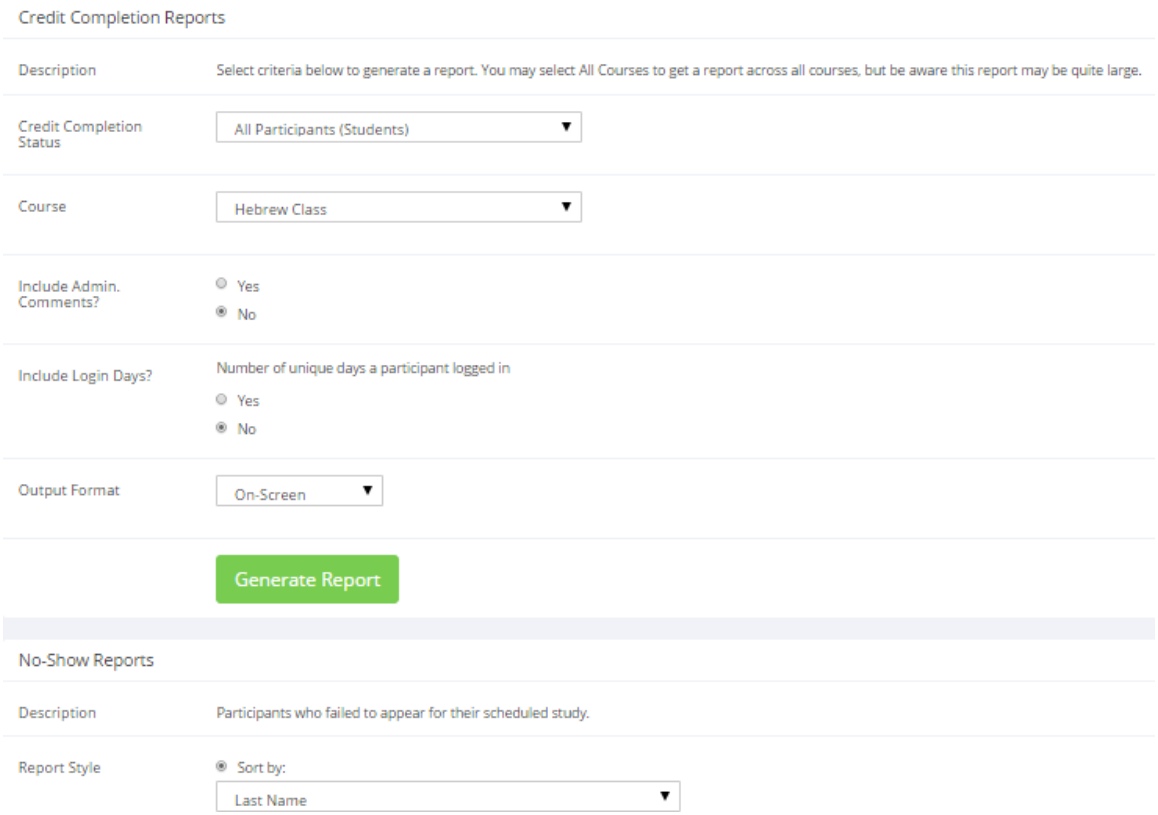


Figure 61 - Report Generation

Credit Completion Reports

The credit completion reports list the credit completion status for each participant. You can choose to list only complete or only incomplete participants, or all participants. A participant is considered a completed participant when the number of credits they have completed is at least as many as they are required to complete.

You must choose a course when generating this report. Courses that are “active” (marked Selectable in Course Listings) will be listed, followed by those that are inactive, when applicable. If your system is configured such that participants can assign credits to individual courses (see System Settings), the resulting report will list the participant’s credit completion status overall, as well as for the selected course. If your system is not configured to allow for individual course credit assignment, then you will just see the participant’s overall credit completion status. Participants who have not completed all their credit requirements are listed in **bold** for easy identification.

You may also choose to view the Admin. Comments for each participant (if there are any) are listed with the report. You may choose to include login days in this report. This is a measure of the number of unique days a participant logged in, and is a good way to measure how often the participant likely checked on the system for available studies. See Login Days Tracking for more information.

The report also includes a column indicating the Overall Unexcused No-Shows a participant has accrued. If there is a policy whereby there is some type of bonus for participants who do not accrue

any unexcused no-shows, then use this column to determine which participants fit into that category (look for values of 0). See No-Show Handling for further information.

The report you generate is identical to the report an instructor can generate, except instructors may not view the Admin. Comments nor Login Days information. Thus, you may find it easier to set up Instructor accounts and allow instructors to generate credit completion reports on their own. You may click on any participant's name to go directly to their user information in the system.

If you would like to generate a report across all courses, choose the All Courses option in the Course selection menu (the All Courses option is the first choice). Be aware that the report may take a while to generate if there are many participants in the system, and in some cases it may be impossible to generate.

If you would like to generate a report of participants who are not currently linked to a course (this might happen if you adjusted their record so their course selection is "NONE", or if they were removed from their courses as part of end of semester maintenance), choose the Participants without a Course option in the Course selection menu.

There is an option to email the report to a specified email address, after you have generated the report in on-screen format (it appears at the bottom of the report). The email address box will be pre-filled with the email address of the instructor of the course, when applicable. Please ensure only one email address is specified. If sent, the emailed report will contain the report in two formats: a nicely-formatted report suitable for printing, and an attachment with the information in CSV (comma-separated) format for use with a data analysis tool.

No-Show Reports

The No-Show report shows participants who have failed to appear for a study. Included in the report are any comments the researcher left when noting the no-show situation. If you click on the participant's name, you will be taken to that participant's record, so you may view all their progress. Participants who are prevented from logging into the system will be noted as "(inactive)" in the report. You may restore these privileges by going to edit that participant's account and allowing them to login to the system.

If you view the report summarized by participant, then you will see a summary of all no-shows earned for each participant that has earned no-shows. You may restrict this report to a certain date range, in which case the report will only include no-shows accrued during the specified date range (based on the date of the timeslot, not when the no-show was actually given by the researcher). You may also restrict it to only show participants who have earned a specified number of no-shows.

Unassigned Credit Reports

This report is available if the system is configured so that participants may assign their credits to a specific course (see System Settings). In some cases, not all credits will have been assigned to a course. Some reasons can include that the credits were from archived data, the participant was signed up for a

study with a batch manual credit grant, or the participant left or was removed from a course and they had credits assigned to that course. There is a link next to each credit if you would like to reassign the credit to a course. Participants may do this on their own by going to My Schedule/Credits.

Time Usage Reports

The Time Usage report gives a listing of how many hours of timeslots have been used, by Study, Researcher, or P.I. (if enabled). If the system is configured to enforce a limit (see Timeslot Usage Restriction in System Settings), the limit is also listed in the appropriate report. You can restrict this report to a specific period of time. If timeslots are linked to a specific researcher, this will not be reflected in the report, and it will be assumed that all usage is for all researchers (for that study). See Timeslots Linked to a Specific Researcher in the Researcher Documentation for more information.

Study Attendance Reports

The Study Attendance Report gives a listing of the ratio of credit grants to no-shows for each study. Some organizations find such a report useful, as a study with an unusually high number of no-shows may indicate poor instructions provided by the researcher.

You may choose a date range restriction for this report, and the date range is based on the timeslot date, not the date the credit or no-show was given. Generally these dates will not be far apart, but with online studies which typically have one timeslot for the entire term, this may be the case.

Credit Usage Report

This report lists the number of credits used by each study, by study, researcher, or P.I. It takes into account non-standard credit grants (for example, if a study is normally worth 2 credits, but a particular participant was granted only 1 credit). Researchers can grant non-standard credits if Variable Credit Granting is enabled in system settings.

If a study has multiple researchers and you run the researcher report, then the usage for a study will be attributed to *all* researchers for that study (in other words, there will be double-counting).

You may choose a date range restriction for this report, and the date range is based on the timeslot date, not the date the credit was granted. Generally these dates will not be far apart, but with online studies which typically have one timeslot for the entire term, this may be the case.

Study Schedule Report

If you want to look at the usage of a particular resource (timeslot locations), you may use this report will show you the use of all resources for a specific date range. This report also lists which studies are using the resource. It also makes it easy to generate a report of all studies taking place on a certain day or range of days. This report could be given to a department administrator in case a participant walks into the office and they have forgotten where their study is located.

If location scheduling is enabled (see System Settings), then there is an option to view all timeslots scheduled where the researcher did not choose a location off the pre-defined list, as well as the opposite case. Online studies are not included in this report, since they don't have a location.

System Summary Report

The system summary report shows basic information about the amount of data in the system. This is a great report to give an overview of usage in the system and overall participant progress.

You may restrict this report to a certain date range. If you do so, the date used for restriction is the date of the study's *timeslot*, and not of the credit grant. These two dates may vary widely, particularly in the case of online studies where the timeslots may be far in the future.

The report contains summary information about the number of studies of each type, and also the number of credits already granted and still available for participants to earn. This is an easy way to monitor and ensure there are enough credit-earning opportunities for participants. If participants may earn credits for completing the prescreen, that will be included in the non-study credit grant information in this report.

The prescreen/survey responses information provides a summary of how many responses are being used by the prescreen and each online survey in the system. One response is roughly equal to one response by one participant to one prescreen or online survey question. The size of this data can have an effect on the performance of your site, so it's good to keep this number as small as possible (definitely below 400,000 responses). One way to reduce this number is to delete online survey studies which are no longer being run, as the survey responses will be deleted along with it. Another easy option is to download the online survey data and then delete it, while keeping the survey and record of participation intact (see the Researcher section of the documentation).

The report will also show a list of who is currently participating in the prescreen or any online surveys in the system. Each individual row in this report is updated only once every 20 minutes.

The report contains six sections: Users, Study Information, Number of Total Studies, Study Credits Granted, Prescreen/Survey Response Data Usage, and Current Prescreen/Online Survey Usage. If you run the report using a date range, only two of the sections will contain data adjusted according to that date range: Study Information, and Study Credits Granted. The other sections of the report contain information that does not lend itself to being restricted based on date.

Here is an explanation of each item in the Study Information section:

Item	**Description**
Studies	The total number of studies in the system. If a date restriction is used, then it counts the number of studies that have timeslots within that date range.
Timeslots	The total number of timeslots. This does not

	consider spaces in each timeslot, so a timeslot with room for 3 participants to sign up is still counted as 1 timeslot. If a date restriction is used, then the count is based on the timeslot's date.
Total Number of Unfilled (Past) Timeslots	The total number of spaces in timeslots that went unfilled. For example, if a timeslot was set up to allow for 3 participants, and only 1 participant signed up, then that would count as 2 unfilled spaces. If no date restriction is used, then this is based on all timeslots in the past. If a date restriction *is* used, then this count is based on all timeslots which took place during the specified date range.
Total Number of No-Shows	The total number of no-shows that were marked. This is based on the count of no-shows, not the credit value of the study, so a no-show for a 2-credit study and a no-show for a 1-credit study each count as 1 no-show for purposes of this computation. If a date restriction is used, then the number is based on no-shows for all timeslots which took place during the specified date range.
Total Credits Granted	The total number of credits granted. This takes into account non-standard credit grants, like if a participant was granted 2 credits for a 1-credit study. If a date restriction is used, then the number is based on credits granted for all timeslots which took place during the specified date range.
Total Non-Study Credits Granted	The total number of non-study credits granted. Non-study credit grants include credits granted for completing the prescreen, along with any non-study credit grants made by the administrator or an instructor. If a date restriction is used, then the number is based on credits granted during the specified date range.
Total (Future) Credits Available	The total number of credits available to be earned which were not earned. For example, if a 1-credit

	study had room for 3 participants, and only 1 participant signed up, then this would count as 2 credits available because there are 2 unfilled spaces where credits could be earned. This is a good way to gauge if participants are not taking advantage of credit-earning opportunities, and also a good way to monitor that sufficient credits are available for participants to earn. If a date restriction is used, then the number is based on credits available for all timeslots which took place during the specified date range.
Total Pending (Awaiting Action) Credits	The total number of credits pending, where a sign-up took place but the researcher has not yet granted credit. This is a good way to monitor completion rates, as a high value here could indicate that participants have signed up for a lot of upcoming studies and will eventually earn credit for them once they actually participate. If a date restriction is used, then the number is based on credits pending for all timeslots which took place during the specified date range. Generally, this number should be 0 if researchers are granting credits in a timely manner. If it is not, you can monitor uncredited timeslots by going to Studies | Uncredited Timeslots.
Overall Credits Completion Rate	The total number of credits completed by all participants, compared to the total number of credits required for all participants. In addition, to showing the current completion rate, the completion rate with pending credits factored in is also displayed. That can give a more accurate measure of how close the pool overall is to completing requirements. This number is not date-specific because requirements are not date-based, so if a date restriction is used, it is ignored for purposes of computing this number.

Mass Email Report

The Mass Email report shows a listing of all instances in the last 6 months when a bulk email facility was used by a user in the system. These emailing facilities are available to the administrator, researchers, and principal investigators, and every usage of it is logged.

The system logs who sent the email, to how many users, their IP (computer) address, the type of email, and the first 1,000 characters of the content of the email. The logging is done when using the following email facilities: Mass Email Notification (administrator-only feature), Prescreen Invitations, and when contacting participants who have signed up for a study (unless the email is to a specific participant signed up for the study, as then it is not a bulk email).

The administrator should monitor this report on a routine basis, and warn or suspend the account privileges of users who send excessive emails. For example, it can be considered excessive if a researcher sends a prescreen invitation email to hundreds of participants on a daily basis. The reason to monitor this is that many universities and email providers will block all incoming email from the system if they notice the volume is too high or they receive complaints from recipients.

We have agreements in place with many large email providers, and they notify us automatically when potential abuse is detected. We will notify the administrator of your site if the situation arises, and we may take further actions if the situation is not corrected in a timely manner. We are required to take these actions as part of our agreements with large email providers.

Prescreen Status Reports

The Prescreen report shows participants and their prescreen completion status. If you do not have the prescreen enabled (see System Settings), then this report will not be listed.

You may view the report sorted by a participant's last name or by course. Admin comments for each participant (if any) will be listed as well. If you choose to view the report ordered by course and a participant is in multiple courses, they will appear once for *each* course they are enrolled in. You may choose which prescreen status to report on. If you choose to view a report of those who have completed the prescreen, the report will also include the date that they completed it, and the time it took them to complete the prescreen (along with an average completion time at the bottom of the report). It is possible to restrict this report to only those who completed the prescreen during a certain date range. This date range restriction only applies when generating a report of those who have completed the prescreen.

If you choose to view those who have started the prescreen but never completed it, this report may change over time. First, the system will routinely remove prescreen responses from participants who started the prescreen but never completed it (usually if the responses are more than 24 hours old). In addition, some of the participants may be currently completing the prescreen when you generate this report, in which case shortly they will appear in the report listing those who have completed the

prescreen. The most common reason for a participant to be listed as starting the prescreen but never completing it is that they did indeed start the prescreen, but then simply logged out or walked away from their computer before completing it.

To view a list of those currently taking the prescreen, see the System Summary Report.

Course Credit History Report

This report lists all studies that participants in the selected course participated in. This report is useful for archival purposes, particularly if your IRB requires you to keep archives of participation history for a number of years on file. It is good to run this report before doing end-of-semester maintenance. If you choose to include credit comments, this will include the comments the researcher included regarding each sign-up (if any).

When selecting a course, courses that are "active" (marked Selectable in Course Listings) will be listed first, followed by those that are inactive, when applicable.

You may restrict this report to a certain date range. If you do so, the date used for restriction is the date of the study's *timeslot*, and not of the credit grant (except in the case of non-study credit grants, where the credit grant date is used). These two dates may vary widely, particularly in the case of online studies where the timeslots may be far in the future.

Duplicate Participant Report

This report lists all participants who have the same first and last name in the system. It is useful to identify cases where a participant may have created more than one account. From this report, you can easily click on each user to see if two accounts with the same name are indeed the same person, or simply a case of two people with the same name.

The report is case-insensitive, so "John Smith" and "john smith" will be considered duplicate users.

Emailing a Group of Users

There are situations where you may want to send a mass email to a group of users, based on certain criteria. One example is you may want to send email to all participants who have not yet completed their requirements, reminding them of an upcoming deadline. Or you may want to email all researchers to notify them of certain information. To use this feature, log in as an administrator from the Tasks toolbar, choose Mass Email and Announcements | Mass E-Mail Notification.

The system lets you send an email to participants, researchers, principal investigators, and instructors. When sending to participants, you may closely define what group of participants you send to, by course, studies they have participated in, credit completion status or earning level, no-show level, and/or prescreen completion status (when applicable). If you choose to email participants who have not signed up for any studies, this may be different than if you email participants who have earned 0 credits. There can be cases where a participant has signed up for studies that have not yet taken place (so they haven't earned credits yet).

In all cases, you may choose to send to a random subset of selected users. This is useful in cases where you don't want to generate an overwhelming response. For example, there may be a few new studies on the site that you want to notify participants about, but notifying all the participants would be undesirable because there are not enough timeslots for even half of them to sign up. In this case, you may choose to send the notification only to a random 50% of selected users. The system does not track what random percentage of users have been emailed previously, so if you email a random 50% one time, and email a random 50% another time, there is a chance the same user will be emailed twice as they will be randomly selected each time.

You may also choose to exclude participants who have participated in certain studies. This is useful if you are sending an announcement about specific studies, and want to leave out those who have already participated in those studies.

If you choose to email Instructors with Selectable Courses, this means the email will be sent to every instructor whose courses are marked Selectable in Course Listings.

If you choose to email Researchers or PIs with Active Online Survey Studies, this means the email will be sent to those Researchers/PIs with online survey studies within the system (not external web studies), which are active. Often this group of users might need special instructions or may need to be reminded that they should routinely download and delete the data they have collected from the system, to ensure ideal system performance.

When sending the email, you also have the option to include the recipient's login information in the email. You may choose to have just their username included, or both their username and a new password. If you choose to have a password included, the system will generate a new random password for the user. Be careful about using this feature, as it will generate a new password for all recipients, thus invalidating their existing password. This can cause confusion for current users if they are already accustomed to using their current password.

You must specify a message to be sent. Each email is sent so that the other recipients of the email are not revealed, for privacy reasons. If you are sending the email to participants, you may choose to have the system automatically include the participant's credit completion status (e.g. "You have completed 3 out of the 4 credits you must earn.") in the email. If you choose to receive a copy of the email and it includes credit status, then the copy sent to you will list only "X" for credit earnings and requirements, since you don't actually have any credit earnings or requirements. The credit information will be accurate when sent to participants.

You cannot include attachments in the email, so if you have a document you would like to include, you should post it on a university webserver and provide a link to the document in the email you send. The reason email attachments cannot be included is that it is considered a bad practice to send a copy of a large attachment to every user, since that means the attachment is duplicated and stored each time, increasing considerably the amount of resources used on the recipients' email servers.

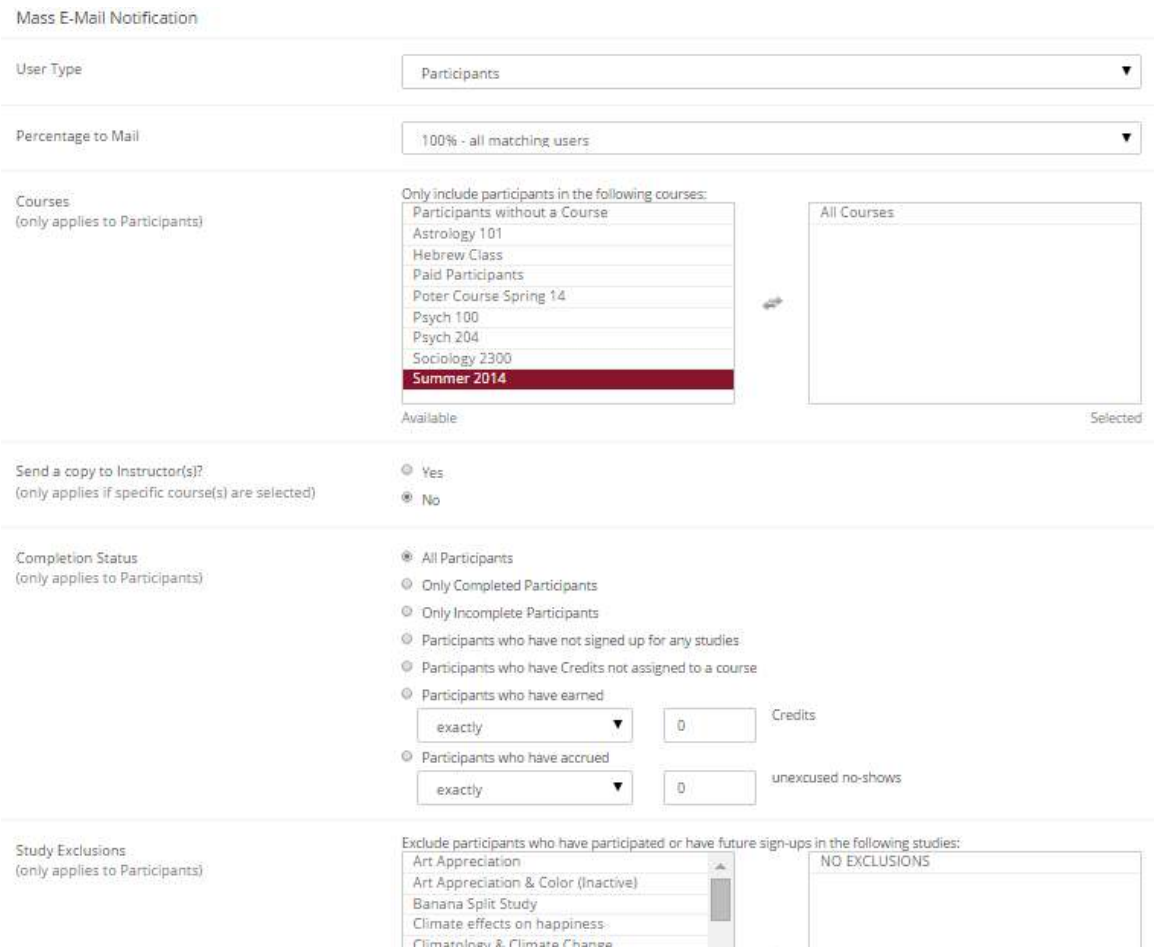


Figure 62 - Mass E-Mail Notification

There is also an option to specify a delay in sending the email, based on the number of hours from when the emailing option is used. This is useful if you want to target a certain time of day (e.g., during the evenings) when the email will be sent. The emails are generated at the time you use the emailing facility, but are stored on the server until the specified sending time. They cannot be removed from the queue once this emailing facility is used.

You may choose what type of users to send to, and enter your message. Click Preview Messages… to proceed. You will be asked to confirm that you would like to send the message. The system sends messages in batches of 3,000 at a time to prevent problems with overloading the server. You will be asked to proceed and send any additional messages, if your message was destined for more than 3,000 people. The system will notify you when all messages have been sent successfully.

Summary information about the email you sent, and in particular to how many recipients it was sent to, will be logged and made available in the Mass Email report. This is done to ensure there is no abuse of the email facility in the system, in compliance with generally accepted Internet practices for sending emails.

Nightly Reminder Emails

If the Automatic Reminder Email feature (see System Settings) is enabled, participants will receive a reminder email of any studies they have scheduled for the following day. This email will only be sent for studies for which participants have not already received credit. Normally, participants will not have already received credit for a study before it is to occur, but this may be the case with an online study, since those do not have a scheduled participation date, but rather a participation deadline date.

If anonymous ID codes are enabled on your system, the reminder will also include the participant's ID code, and a reminder that they should bring this code with them to the study.

If a researcher has chosen to enable the reminder email for themselves, they will receive an email to remind them of their timeslots scheduled for the following day. They will also receive an email if they have timeslots more than 2 days old that they have not dealt with.

Reminder emails of this type are processed for sending at 5:00pm New York time every evening for most customers, particularly those in North and South America. For most customers in Europe and the Middle East, it is processed at 12:00pm New York time (so 5 hours earlier). For most customers in the Asia Pacific region, it is processed at 5:00am New York time (so 12 hours earlier).

Email Security Codes

In emails sent by the system to participants regarding a study sign-up, the system will usually insert a string of letters at the bottom of the email. This is a special code that can be decoded by the administrator. It contains information about which study and timeslot the email pertains to, as well as the date and time of the timeslot *at the time the email was sent*. It also includes the time the email was sent. This code is useful in resolving disputes where a participant claims the date or time of the study was changed or something similar. There have been cases where participants have altered the content of the email (e.g. the dates and times) and presented that as evidence that the study was changed.

Even if participants alter the email, they will not have success in altering the security code. In the case of a dispute, ask them to forward the email in its entirety, and you will see the security code at the bottom of the email. To decode the security code, go to Administrator | Help and Documentation | Check Security Code and you can cross-check the information displayed therein with the email provided by the participant. In cases where the information is different between the decoded information and the information provided by the participant, this likely means that the participant altered the email content. If you need assistance interpreting the results, please contact technical support.

Batch Operations

There are some occasions where you may want to deactivate or activate a set of user accounts, adjust credits, email login information, or grant a non-study credit to a batch of users (often this is done when a group of participants completes a research alternative) in bulk. This can all be done with the Batch Operations feature, which is available by going to Tasks | System Maintenance and Data Management.

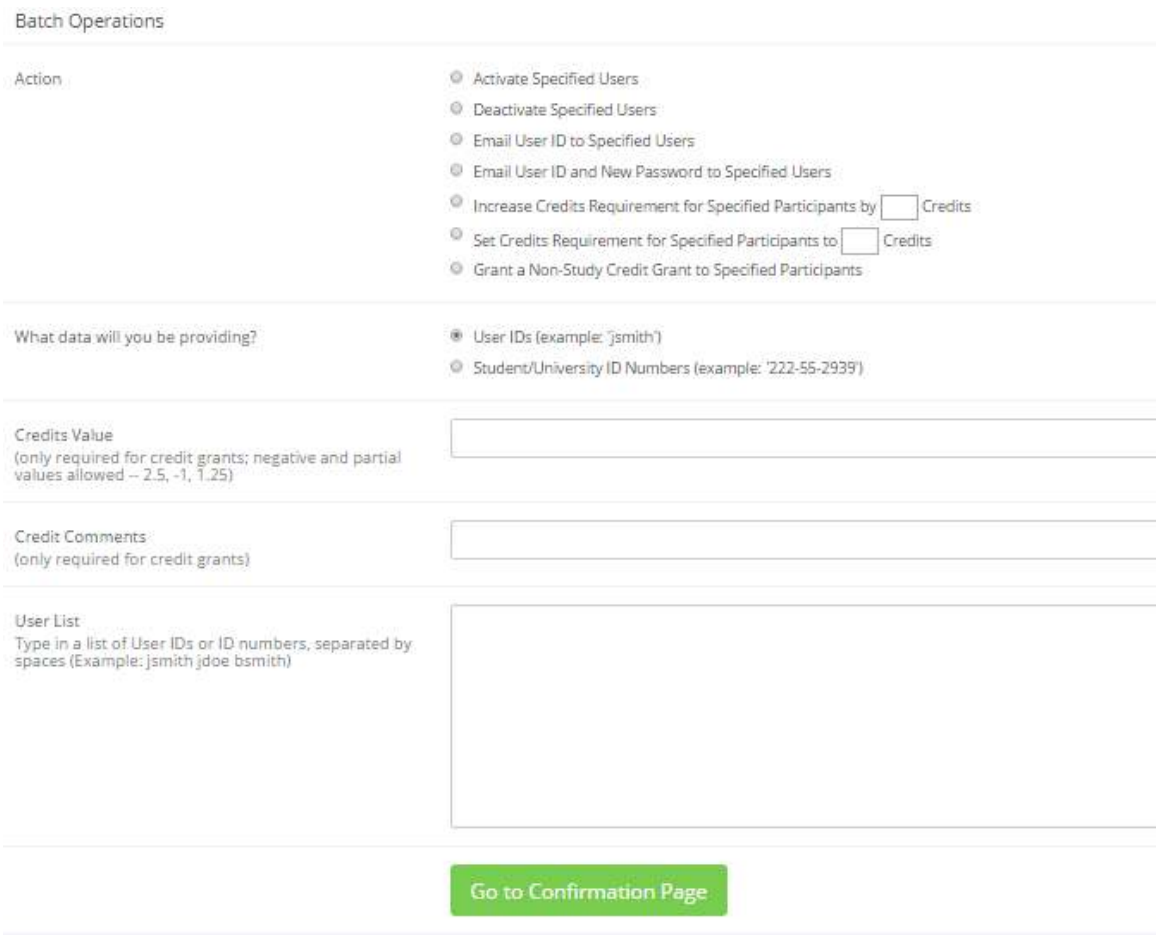

Batch Operations
Action
Activate Specified Users
Deactivate Specified Users
Email User ID to Specified Users
Email User ID and New Password to Specified Users
Increase Credits Requirement for Specified Participants by Credits
Set Credits Requirement for Specified Participants to Credits
Grant a Non-Study Credit Grant to Specified Participants
What data will you be providing?
User IDs (example: 'jsmith')
Student/University ID Numbers (example: '222-55-2939')
Credits Value
(only required for credit grants; negative and partial values allowed -- 2.5, -1, 1.25)
Credit Comments
(only required for credit grants)
User List
Type in a list of User IDs or ID numbers, separated by spaces (Example: jsmith jdoe bsmith)
Go to Confirmation Page

Figure 63 - Batch Operations

You may specify a set of users by either their user ID or University ID number, but you must be consistent (i.e., supply only one type throughout). The IDs may be pasted into the User List box, separated by spaces. The checking of user IDs and University IDs provided is case-insensitive.

If you are granting a non-study credit (available only for participants), you must specify the credit value, and a comment about the credit. This comment will be visible to participants. Because a non-study credit grant is a special case, participants will not receive an email notifying them of this credit grant, even if Credit Notification Email is enabled (see System Settings).

If you choose to deactivate users (this applies to any type of user account), the chosen users' accounts will be deactivated (so they cannot log in), but not deleted.

You may also adjust a participant's credit requirements by setting them to a fixed value, or increasing them by a specified value.

You may also set the timeslot usage limit for specified P.I.'s or researchers to a set value.

There is also the option to email a group of users with their login information, and generate a new password for them.

After you choose which operation you would like to perform, you will be taken to a confirmation page so you can verify the proper users were found, and you may then continue with the task.

You will have little success performing such operations on participant accounts, if you are providing University ID numbers and Student ID Deactivation is set to Yes (see System Settings). In that case, there is no University (Student) ID number stored in the system for participants, so there is nothing to match on. In this situation, you should use the User ID instead.

Automating Tasks - API

There is an API (Application Programming Interface) available that makes it easier for the administrator to access some data in the system in an automated fashion. The API is intended for advanced users with programming skills, and is detailed in a separate document. This is available on the support site, which can be accessed by logging into the system as an administrator and going to Administrator | Help and Documentation | Documentation.

Granting Non-Study Credit

There are often occasions when you want to grant a participant credit that is not associated with a study. This is one way to grant credit for completing a research alternative that is not set otherwise set up in the system. You may also need to grant a non-study credit for some other unusual case, like to adjust for a special situation that occurred during a study. You can even deduct participant credit by granting them a negative number of credits (-1, -2, etc.).

To grant a non-study credit, find the participant's record by going to User Management | View and Edit Users. When you find the desired participant and click on Edit User, you will see an option in the right column to grant them credit. Choose the number of credits you would like to grant (type in a negative number to deduct credit). You may also assign the credit to a course, if course credit assignment is enabled (see System Settings). Finally, you may (optionally) enter comments about this credit grant ("Research Paper", etc.). The credits will be granted as soon as the changes are saved. It should be noted that an email notification of this credit grant will *not* be sent to the participant (it is a special case), even if email credit notification is turned on in System Settings.

If you need to grant a Non-Study Credit grant to a large group of participants (typically this is done after participants complete an off-line prescreen), use the Batch Operations feature instead (in the System Maintenance and Data Management menu).

To delete a Non-Study Credit Grant, use the Delete link next to the credit you would like to delete. This appears when viewing the participant's information and a listing of the studies they have signed up for. An email notification will *not* be sent to the participant when the credit grant is deleted.

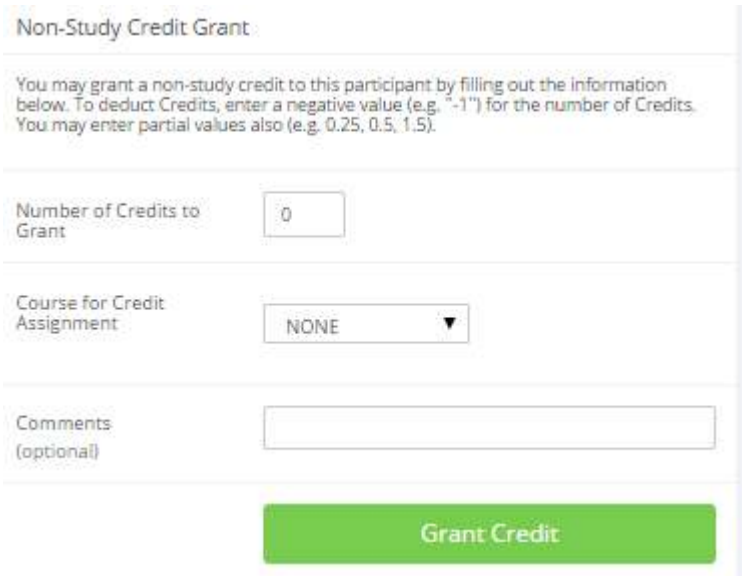

Non-Study Credit Grant
You may grant a non-study credit to this participant by filling out the information below. To deduct Credits, enter a negative value (e.g. "-1") for the number of Credits. You may enter partial values also (e.g. 0.25, 0.5, 1.5).
Number of Credits to Grant
0
Course for Credit Assignment
NONE
Comments (optional)
Grant Credit

Figure 64 - Non-Study Credit Grant

Course Maintenance

All participants must belong to at least one course. The system may also be configured such that participants may belong to multiple courses (see System Settings).

The Course Maintenance section is accessed from Set Up | Course Listings. Typically, you will need to set up and update courses at the start of each semester, but not need to make adjustments during the semester.

If your system is configured to allow participants to create their own accounts (see System Settings) or change their course enrollment, you will see a "Selectable?" Yes/No option next to each course. For each course, if you choose Yes to this option, then the course will appear as a choice on the form where participants create their own accounts or change which courses they are in. The reason you may want to prevent participants from selecting certain courses is if you've created special case courses (for instance, a "course" that contains participants who failed to complete their requirements the previous semester, from any course). As a semester ends, you may choose to keep a course listed in the system, but not make it Selectable, for historical tracking purposes.

For each course, you must specify the number of (study) credits required of participants in that course. A value of 0 for credit requirements is acceptable, and is often used when participants in the course are participating for extra credit and not as a requirement. If a participant is allowed to belong to multiple courses (see Multiple Course Support setting in System Settings), then their credit requirements will be computed based on the value of the Multiple Course Requirements setting (see System Settings). The requirements are only computed at the time the account is created, but they can be adjusted for each individual participant if necessary (see Adding and Editing Users).

If you set the requirement for a course to one value, and change it later, it will *not* change it for participants who are already a member of that course. The changes to a course requirement will only

affect those who join that course from that point onwards. If you need the requirements adjusted for participants already in a course, please contact Technical Support and we can usually adjust this directly in the database for you.

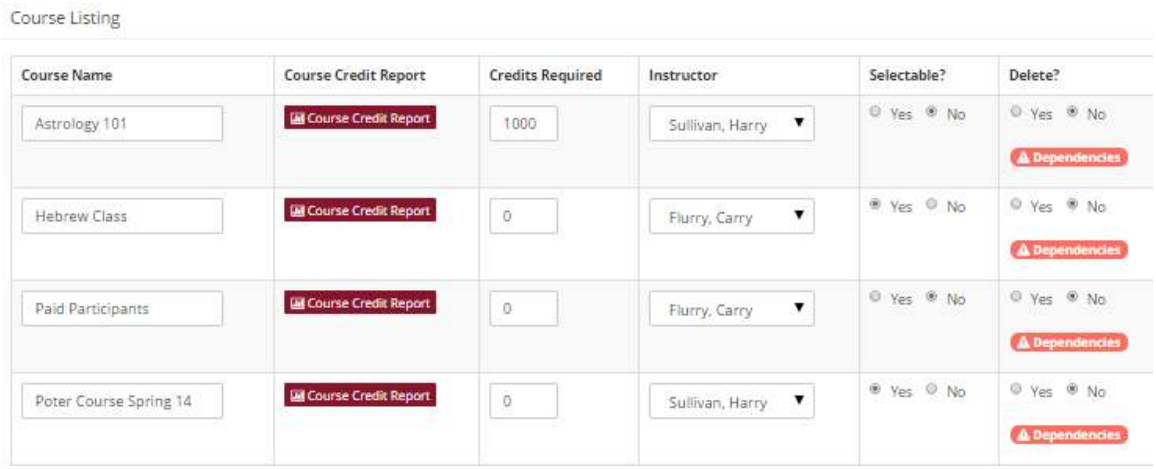


Figure 65 - Course Maintenance

A delete option will appear next to eligible courses which may be deleted. Courses are eligible for deletion if no students or courses are linked to the course. The course may also be deleted if all credits linked to the course are 0 (which would be the case if participation history was retained from a previous semester). If a student is linked to a course that is deleted, they will be removed from that course. If that is the only course they were in (so that now they are in no courses), they will be asked to select a course upon their next login. In cases where removal from a course or deletion of retained sign-ups is a possibility, the word “dependencies” will be listed below the deletion option for that course. If you see “dependencies” listed, that’s usually a sign that you should first do end of semester maintenance to either delete participants or at least remove them from their courses, and then go to delete the course.

Some organizations do not have separate courses, or no courses at all, when they run their subject pool. In this situation, it is recommended to create just one “generic” course (e.g. “Participant Pool”). If there is only one course in the system, and participants are allowed to create their own accounts, they will not even see a course selection option, as they will automatically be placed into the only available course.

If there are sections of the same course, it is advisable to make each a separate “course” in the system (e.g. “Psych 100 Section A”, “Psych 100 Section B”) if there is a reason to treat them as separate groups (often due to different instructors or different course credit requirements). If there is the opportunity for confusion, it may be advisable to further qualify the course name with the instructor’s name (e.g. “Psych 100 Section A, Professor Jones”). The instructor name is not automatically listed to participants, so that should be included in the course name if necessary.

In general, it is not advisable to create a course with more than 1,000 participants, as this can cause certain course reports to become unwieldy and perhaps not work at all. If there are really groups this

big, you should just create one course, wait until it gets reasonably large, and then create a second course for new participants (and make the old course not selectable).

Likewise, creating too many courses can make things unwieldy, such as when researchers go to restrict their study to those in certain courses, and the list of courses is too large to deal with. This can also make things tough for the administrator when doing user imports of courses (since those can be done only one course at a time) and when generating Course Credit History reports. One strategy if a course has a number of small sections (i.e. less than 50 participants per section) is to combine a few sections into one course (e.g. “Psych 100, Sections A-D”). An ideal course size is 100-300 participants.

For your convenience, a link to the course credit report for each course is listed on this page, just below the course name.

You may add up to 10 courses at a time. If you need to add more courses, simply add the first 10 courses, save you changes, and you’ll be able to add another 10 courses.

Courses that are no longer running, and with no participants in them, should be deleted to avoid clutter when researchers go to set up course restrictions. There is no data associated with the course if there are no participants in the course, except the name, requirements and instructor so those can be easily re-added later.

Location Maintenance and Scheduling

If location scheduling is enabled in System Settings, then the system may be used to handle the scheduling of locations (rooms/labs) where timeslots are scheduled. With such a feature, the administrator can set up a list of locations, and those locations appear on a list when researchers go to schedule their timeslots. They may pull up the schedule for a specific location, or determine which locations are available on a specific date, and schedule their timeslots appropriately. The system will prevent double-booking of locations.

In the event a desired location is not in the list of locations, the researcher may enter their own text for the timeslot they are scheduling, so they are not forced to take advantage of the built-in location scheduling feature. This is useful when the researcher is using a location that would not benefit from this scheduling feature, such as a study conducted in their own office. In such a situation, the researcher does not need to worry about the location being already booked, since no one else would schedule a study in their office.

The list of locations available to all researchers is set up in Set Up | Location Listings, by the administrator. Each study may use only one location from the list of available locations (or researchers can type in their own text), so it is advisable to enter in locations that are as specific as possible.

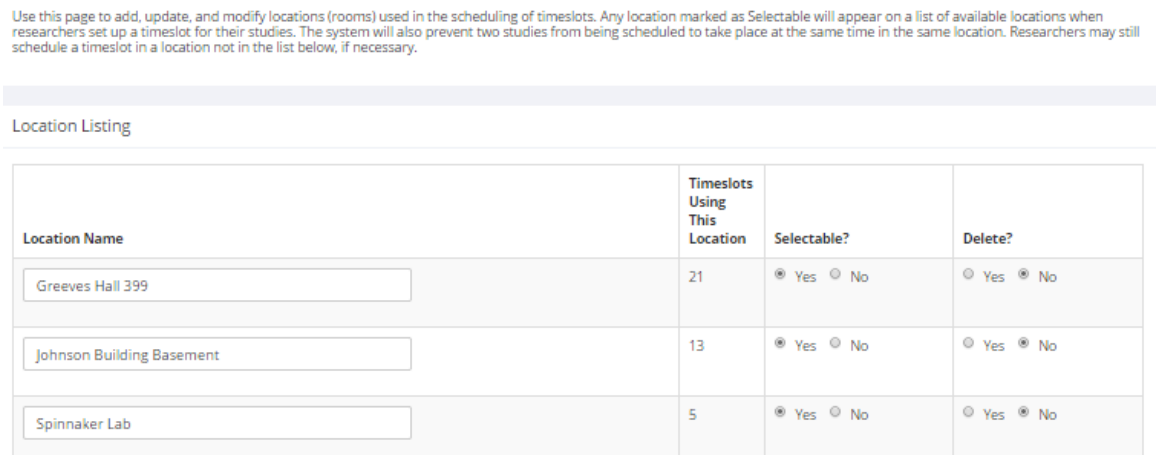

Use this page to add, update, and modify locations (rooms) used in the scheduling of timeslots. Any location marked as Selectable will appear on a list of available locations when researchers set up a timeslot for their studies. The system will also prevent two studies from being scheduled to take place at the same time in the same location. Researchers may still schedule a timeslot in a location not in the list below, if necessary.
Location Listing
Location Name
Timeslots Using This Location
Selectable?
Delete?
Greeves Hall 399
21
Yes No
Yes No
Johnson Building Basement
13
Yes No
Yes No
Spinnaker Lab
5
Yes No
Yes No

Figure 66 - Location Setup

Changes take effect immediately after they are saved. If a location is deleted and timeslots were using that location, those timeslots will remain with the same location, but the location will be treated as if the researcher manually typed it in.

If a location is not marked as Selectable, it will not appear in the list of available locations when researchers go to schedule a timeslot. This is useful if a location is temporarily unavailable (for example, due to renovations) but will be available again in the future.

This feature is not intended as a university-wide scheduling system for all types of resources. Generally, universities have a campus-wide system in place for this. Rather, the feature within the software can be viewed more as a fail-safe mechanism to prevent researchers from double-booking the same location.

End-of-Semester Maintenance

The software itself does not have a concept of semesters or terms, nor does it enforce any semester concept. You may use the system for as many “semesters” as you like, within the time period of your subscription to the system. Some organizations find no need to clearly define semesters because they run an ongoing participant pool (typically a paid pool), while this definition is useful in cases of participation for course credit.

When the end of your term, whatever term that may be, occurs, there is some end of semester maintenance you might like to perform. Typical end-of-semester maintenance would involve exporting a copy of the data for archival purposes, then clearing it out of the system in bulk, in preparation for the start of a new term. Many organizations clear out all the participant accounts and sometimes the studies, though they usually leave the researcher accounts if those stay the same from term-to-term. You also have the option of retaining key data and carrying it over, specifically participation data. This is useful if you want to prevent a participant from participating again in a study they participated in during the previous term.

The participation history retention option will reset the credits earned (and any no-shows) to 0 for the timeslots where participation history is retained. If a sign-up is marked as a penalty-earning no-show, it will be converted to a no-penalty no-show but its previous status will be marked in the comments for that sign-up.

It should be noted that once you clear out this data, it cannot be retrieved. Use this feature carefully, as it deletes large amounts of data. It might be useful to make some backups of the data, for example running Course Credit History reports and maybe making a copy of the prescreen responses. After doing end-of-semester maintenance, you should look at a few studies and participant accounts (where applicable) to make sure the data is in the state you expected it to be in after running the maintenance. If you notice a problem, please contact Sona Systems Technical Support immediately (email is the fastest way to reach us), and ask us if we can restore a backup of your site and let us know when the accidental deletion occurred. Backups are made once a day, so we can likely restore your site to a backup made earlier that day. Note that if you choose this option, all changes made since the backup will be lost. If you wait more than a few days to request that we restore your database, there is a chance we may not have a backup made many days earlier. In general, we maintain backups for each of the last 5 calendar days, but not necessarily longer than that.

It is important to note that a participant's online survey responses (if the online survey is in the system) are connected to their sign-up for that online survey study. So, if you delete either the participant's account, or their sign-up (participation history), then their online survey responses will also be deleted. Researchers should get in the habit of routinely downloading and deleting (from the system) survey responses collected for their studies. This is not only good data storage practice for them to save the data on their own, but the system performs better with fewer online survey responses stored in the system.

The main point here is that some end of semester maintenance should be done on a routine basis. This may be as simple as deleting older studies and users, but even that is beneficial. Too much data in the system can negatively affect system performance. See System Limits for more information.

Exporting Data

While the data export feature is typically used at the end of the semester, you may use it at any time, as many times as you like. Exporting data will not erase it from the system. Use the end-of-semester maintenance features to clear out old data if you would like to delete mass amounts of data from the system.

The data export feature lets you export entire sets of data, in standard comma-separated (CSV) format. CSV is a standard form which most programs, including Microsoft Excel and Microsoft Access, can understand and work with properly. If the data originally contained any carriage-returns (this is rare), then these will be stripped out from the CSV as it makes it difficult for programs to properly import the data when there are carriage-returns in the data.

As the data export may contain sensitive information, you should handle the data you export carefully. See the Regulatory Compliance section in this documentation for more information.

The system allows you to export the CSV-formatted data in either Archival or Analysis format. The Archival format is "normalized" data, and makes it easier to import the data into a database system like Microsoft Access. The Analysis format is useful for importing the data into a spreadsheet program like Microsoft Excel, for data analysis. It contains "de-normalized" data that makes it easier to analyze. If you are not sure which format is best, you can always export the data in both formats.

To start the data export, make sure you are logged in as an administrator, and go to System Maintenance and Data Management | Data Export from the Tasks menu. You will see a list of choices for the type of data (tables) you can export, and what data is included in each export. If you want to export all the data for archival purposes, you should make sure to export every table, in Archival Format.

When you click a link for the type of data and format you would like to export, one of three scenarios will happen in your web browser, depending on how your web browser is configured. Listed below is what you should do depending on how your browser responds. When saving data, it is recommended you save the files with a ".CSV" extension.

1. The data loads in Microsoft Excel. To save the data, choose File | Save As.. and save it as a CSV file or an Excel worksheet (your choice). If the file loads and the data does not line up into the columns properly, save it (instead of opening with Excel), then open the file with Excel (directly through Excel).
2. The browser asks if you would like to save the file. Save the file with a .CSV extension.
3. The browser loads the file on your screen, but not in Excel. Save the file with a .CSV extension, using the File | Save or File | Save As.. feature in your browser. Be sure to save it as *text*, not HTML format.

There is a lot of data that can be exported, and it may be cumbersome. In most cases, the only information that really needs to be kept on file is a list of participants, the studies they participated in, and their credit status. If this is the case, the Course Credit History report will have all this information and is much easier to print and store on file. Many IRBs require that this information is retained in hard-copy (printed) format for a certain number of years.

In some cases, you will encounter an error when trying to export certain items. That typically occurs when there is too much data in the system. See Data Limits for guidance on how to reduce the size of data stored in the system.

Clearing Out Old Data

After you have made a backup copy of data with the Data Export feature, you may elect to clear out (erase) old data. You have two options for this: (Basic) End-of-Semester Maintenance and Advanced End-of-Semester Maintenance.

If you just want to delete all data from the system, or some subset of that (for example, deleting all participants), it is easier to use basic end-of-semester maintenance. If you have special needs, like

retaining participation history or performing maintenance on a course-by-course basis, then Advanced End-of-Semester Maintenance will be a better option.

Basic End-of-Semester Maintenance

This is accessed by going to Tasks | System Maintenance and Data Management | End-of-Semester Maintenance. You will be given a number of choices of what types of data to delete or modify. Listed below is a description of those options, and what data may be deleted or modified by using that option. Not all options may appear on your system, depending on how your system is configured. You may end up using more than one of the options below to complete the maintenance.

Option	**Data That Is Deleted or Modified**
Participants	
Delete All Participants	All participant account data is deleted, as well as their credits, sign-up information, online survey responses, and prescreen responses.
Delete All Except Incomplete Participants	All the same data is deleted as for Delete All Participants, but only for participants who have earned at least as many credits as they are required to earn.
Delete All Participants without Courses	All the same data is deleted as for Delete All Participants, but only for participants who are not currently a member of any course.
Delete All Deactivated Participants	All the same data is deleted as for Delete All Participants, but only for participants who are currently deactivated (not allowed to login to the system).
Idle Participant Deactivation	This will deactivate (remove their ability to log in and also to receive emails from the system) all participants who have not logged in since a specified date, including participants who have never logged in. Note that login tracking has only been a feature of the system since August 2006, so any participants who have not logged in since that time will also be deactivated. No data will be deleted.
Idle Participant Deletion	This will delete (remove all data associated with them) all participants who have not logged in since a

	specified date, including those who have never logged in. Note that login tracking has only been a feature of the system since August 2006, so any participants who have not logged in since that time will also be deleted. For these idle participants, the same data will be deleted as is deleted with the Delete All Participants option above, though only for the idle participants.
Delete All Idle Participants	This will delete (remove all data associated with them) all participants who have never logged in. Note that login tracking has only been a feature of the system since August 2006, so any participants who have not logged in since that time will also be deleted. For these idle participants, the same data will be deleted as is deleted with the Delete All Participants option above, though only for the idle participants.
Deactivate All Participants	All participant accounts are deactivated so they may not login to the system, but all their information is retained.
Activate All Participants	All participant accounts are activated so they may login to the system. All their information is retained.
Reset Login Days of All Participants	Set login days of all participants to 0. Login days is a measure of the number of unique days that a participant logged in. No other information is changed.
Reset All Manually Limited Accounts	Resets all participant accounts that were manually limited (so that they could only sign up for research alternative studies) to automatic. By setting to automatic, they will be limited based on accrued unexcused no-shows (see No-Show Account Limit in System Settings).
Delete All No-Shows	Deletes all no-shows (excused and unexcused) and resets the unexcused no-show count to 0. Accounts which were automatically limited due to accrued unexcused no-shows will have the limit removed. See No-Show Handling for more information on the limits

	related to no-shows.
Convert All No-Shows	Converts all unexcused no-shows to excused no-shows. This also resets the unexcused no-show count to 0. Accounts which were automatically limited due to accrued unexcused no-shows will have the limit removed. See No-Show Handling for more information on the limits related to no-shows
Reset All Participant Passwords	This will require all participants to choose a new password the next time they log in. This can be useful to ensure passwords are routinely changed.
Researchers	
Delete All Researchers	All researchers, their studies, sign-ups, timeslots, and participant sign-up data is deleted. This effectively deletes all studies.
Delete All Researchers Without Studies	All researchers who have no studies will be deleted.
Idle Researcher Delete	This will delete (remove all data associated with them) all researchers who have not logged in since a specified date (or who have never logged in), and who have no studies. Note that login tracking has only been a feature of the system since August 2006, so any researchers who have not logged in since that time will also be deleted.
Deactivate All Researchers	All researcher accounts are deactivated so they may not login to the system, but all their information is retained.
Activate All Researchers	All researcher accounts are activated so they may login to the system. All their information is retained.
Reset All Researcher Passwords	This will require all researchers to choose a new password the next time they log in. This can be useful to ensure passwords are routinely changed.
Principal Investigators	

Delete All Principal Investigators	All principal investigators, their studies, sign-ups, timeslots, and participant sign-up data is deleted. This effectively deletes all studies.
Delete All Principal Investigators Without Studies	All principal investigators who have no studies will be deleted.
Deactivate All Principal Investigators	All principal investigator accounts are deactivated so they may not log in to the system, but all their information is retained.
Activate All Principal Investigators	All principal investigator accounts are activated so they may login to the system. All their information is retained.
Reset All Principal Investigator Passwords	This will require all principal investigators to choose a new password the next time they log in. This can be useful to ensure passwords are routinely changed.
Instructors	
Delete All Instructors	All instructor accounts are deleted. If they were listed as an instructor for a course, the course remains but with no instructor.
Delete All Instructors Without Courses	All instructor accounts where the instructor is not listed as an instructor for any course are deleted.
Deactivate All Instructors	All instructor accounts are deactivated so they may not log in to the system, but all their information is retained.
Activate All Instructors	All instructor accounts are activated so they may log in to the system. All their information is retained.
Reset All Instructor Passwords	This will require all instructors to choose a new password the next time they log in. This can be useful to ensure passwords are routinely changed.
Studies and Timeslots	
Delete All Studies	All studies, sign-ups, timeslots, survey responses, and

	participant sign-up data for studies is deleted.
Delete All Studies, Preserve Online Survey Study Questions	This is the same as Delete All Studies, except online survey studies are retained along with their questions. Note that the survey responses are *not* retained, and any pre-requisite or disqualifier settings for the studies are also removed. This option is useful if researchers do not want to be forced to set up their online survey studies from scratch, but there is still a need to clear out data in the system.
Delete Multiple Studies	Delete selected studies. See Batch Study Deletion for more information.
Delete Old Timeslots (Empty)	Delete all timeslots within a specified date range that do not have any sign-ups.
Delete Old Timeslots (All)	Delete all timeslots within a specified date range, even if there are sign-ups. If you do this, records of the sign-ups will be lost, along with any survey response data collected. Timeslots which have unexcused no-shows will not be deleted – to delete those, first convert them to excused no-shows or delete them (see relevant options in the Participants section on this same page).
Delete Old Timeslots (No-Shows)	Delete all zero-credit no-shows (both excused and unexcused) older than the date specified. This is useful if you want to start participants off with a "clean slate" in terms of no-show accruals, though there are options that may be better in Advanced End-of-Semester Maintenance, and on this page in the Participants section. Participant accounts which were automatically limited due to accruing too many unexcused no-shows (see No-Show Handling) will have the limit removed if the deletion of no-shows takes them below the limit.
Adjust All Studies	Adjust all studies at once, including whether they are approved, active, IRB expiration date, and any timeslot usage quotas on the studies. See Batch Study Updates for more information.

Prescreens	
Delete All Prescreen Information	All prescreen responses, prescreen questions, and study restrictions based on prescreens. See Deleting a Prescreen for more information.
Delete All Prescreen Responses	Delete all prescreen responses, but keep prescreen questions and study restrictions intact. Doing so will require participants to complete the prescreen again the next time they log in, assuming it is available. Credits earned for the prescreen will not be removed.
Timeslot Usage Quota Adjustment	Set the timeslot usage quota for all researchers or P.I.'s to a specific value, or to a specific value above their current usage level. This only applies if timeslot usage quotas are implemented at this level (see System Settings).

The Delete Old Timeslots choices are useful when you normally retain participation history, but want to delete very old timeslots as those are no longer worth retaining, while retaining older timeslots that aren't quite as old. You may choose either to delete only empty timeslots (timeslots which had no participants signed up), or all timeslots within the specified date range. Note that you can only delete old timeslots that have sign-ups if the timeslots were previously archived with participation history retention (see Advanced End-of-Semester Maintenance), which means the credit and no-show values for the sign-ups were set to 0. Empty timeslots (timeslots with no sign-ups at all) are routinely deleted by the system automatically, after those timeslots are more than 3 months old.

As you can see from the table above, large amounts of data are deleted or modified when using these options. Use these options carefully. When you choose any of the options, you will be given a warning and a notice of how many records will be affected, with the choice to proceed. In particular, note that deleting a participant will delete all data associated with them, including any online survey data they provided.

Despite the many options the option that is by far most popular and will meet most needs is Delete All Participants and then Delete All Studies. This deletes all the sign-up history and credit history, allowing for a fresh start.

If the options provided don't exactly match how you would like to handle data at the end of the semester, please contact Sona Systems Technical Support and describe your needs, and we can recommend the best options to choose. It is also possible that you need to use more than one of the options above to do exactly what you need. Finally, the Advanced End-of-Semester Maintenance options (described below) may be better suited to your needs.

Advanced End-of-Semester Maintenance

If you have specific needs in terms of end-of-semester maintenance, the options in Advanced End-of-Semester Maintenance are likely the best options to use. This can be accessed by going to Tasks | System Maintenance and Data Management | Advanced End-of-Semester Maintenance. You may choose to perform the operations only on participants (students) in a specific course, or across all courses. You may also choose to retain certain data and carry it forward. The most common reason to use Advanced End of Semester Maintenance is when sign-up data needs to be retained so that participants cannot sign up for the same study again in the future, but the credits earned should not carry over (to prevent double-counting).

If you choose a specific course, and a participant is in more than one course, the operation will affect all their courses. For example, if you choose to delete all participants in Course A and a participant in Course A is also in Course B, they will be deleted. Use these options with caution.

If you choose to delete a participant, all data associated with that participant, including their online survey and prescreen responses, will be deleted.

If you choose to delete a participant's participation history, their online survey responses for any online surveys associated with their participation history will also be deleted. In addition, all records of their participation in studies will be deleted.

The Delete Participants option, if chosen, will delete all participants in the selected course. This will delete their account and all information connected to it entirely. If you choose this option, all the other options on the form are ignored as they do not apply.

The remaining 5 options apply if you choose not to delete the specified participants. These options assume you will be retaining the accounts of the specified participants, and then give you options about what to do with each part of participants' records.

There are many options and it may seem overwhelming, but in the majority of cases, one of the 3 combinations of options (described further below) will meet your needs. It's rare there is a need to choose a different combination of options.

Option	**Description**
Credits Earned	This option maps to the Credits Earned value of a participant's record. If you choose to retain their credits earned value, then you will also need to choose to retain their credit history and associated credits. If you choose not to retain their credits earned value, then you will need to either delete their participation

	history, or retain it and zero out the credit values.
Credits Needed	This option maps to the Credits Needed value of a participants record. If you choose to retain this value, you must also choose to keep them in their current courses. If you choose to have this recomputed based on the courses they are in, then you must also choose to remove them from their current courses.
Course Associations	This option maps to the Courses a participant is a member of. If you choose to remove them from their current courses, then you must also choose to have their credits needed recomputed based on the courses they are in. Participants will be asked to choose course(s) from the list of courses marked Selectable in Course Listings, on their next login. If you choose to keep them in their current courses, then you must also choose to retain the current credits needed value.
Participation History	The option maps to the “line-items” regarding each sign-up for each study a participant participated in. If this is deleted, then all records associated with the participant’s sign-up (including responses to an online survey study, and no-shows) will also be deleted. It is useful to retain this information when a study runs for many terms, and the researcher wants to ensure that a participant who participated in a previous term cannot participate again. In that case, it’s best to choose to retain participation history. If the credits do not need to be carried over (they rarely do, as doing so may provide the opportunity for a participant to reassign them to their new courses which is effectively double-counting), then it’s best to choose to zero out the credit values. If a study has only signups with zero credit values, then it is eligible for deletion by the administrator. If this option is chosen, then the former credit or penalty value, along with the

	course the credit was assigned to (when applicable), will be placed in the comments of the signup (for later reference), while the actual credit will be zeroed out. If a course name is too long to fit in the comments field, it will be shortened to fit within the allocated space.
No-Shows	Generally, there is no reason to retain no-show information from semester-to-semester, unless credits are also being carried over. If you delete no-shows (this applies to both unexcused and excused no-shows), or convert unexcused no-shows to excused no-shows, this will affect (lower) the unexcused no-show tally for participants. This is useful if participants face account limitations for accruing too many unexcused no-shows (see No-Show Handling), but they should start with a clean record for the next semester. If an account was automatically limited for accruing too many unexcused no-shows (see No-Show Account Limit in System Settings), then deleting or converting the no-shows (to excused) will remove the limit that was in place. If you choose to delete participation history (the previous option), this will also delete no-show information.

While there are a lot of options here, the three most popular combination of options are as follows, with the third combination being the most popular:

1. Delete Participants
2. Do not delete participants, change credits earned to 0, recompute credits needed, remove from courses, delete participation history, delete no-shows. This results in retaining the login information for participants but deletes all their credit information and also deletes the record of which studies a participant participated in (along with their survey responses, if it was an online survey study), and removes them from their courses, and it also resets their unexcused no-show count back to zero. This requires them to select new course(s) upon their next login.
3. Do not delete participants, change credits earned to 0, recompute credits needed, remove from courses, retain participation history but zero out credits, delete no-shows. This results in retaining the login information and record of which studies a participant participated in (along with their survey responses, if it was an online survey study), while deleting their no-shows, but

also removes the credits from those studies and requires them to select new course(s) upon their next login. This prevents them from re-using the credits again, while still keeping track of their past study participation so they cannot sign up for those studies again.

If you choose options which result in the participant's account being retained, but you would like them to complete the prescreen again, you can go to (Basic) End of Semester Maintenance and choose the Delete All Prescreen Responses option, or you can set the Participant Retake Date in the prescreen (recommended option).

Monitoring Studies

As an administrator, there may be occasions when you need to modify or monitor a study. You might need to deactivate a study that was activated due to a recent IRB approval revocation. Alternatively, you may need to grant credit to a participant because the researcher failed to do so. To view and modify studies, choose the View All Studies option from the Studies toolbar. You will see a list of all studies, and you can change anything about them just as if you were the researcher. See the researcher documentation for more information on researcher features.

As the administrator, you may also search for a specific study by name, by typing part of the study's name into the Search box (Studies | View All Studies). The search performed is case-insensitive, and will search for the selected text anywhere within the study name (a substring search). The search will search all studies, even if you are currently viewing only active or inactive studies.

Checking Study Configuration

Sometimes researchers may claim that their study is not visible to participants, or is only visible to a few participants. This is likely due to a configuration error on their part. For example, they may have set such narrow prescreen participation restrictions that only a few participants qualify. Another scenario is they may claim a specific participant tried to sign up for the study but did not see it or was instructed by the system that they did not qualify.

To solve the problem, you (but not researchers) may go to Check Study Configuration, which is an option when viewing a study.

When you first go to that page, it will show both General Configuration and Specific Configuration items. The General Configuration items refer to general study configuration items which are not specific to any participant. For example, regardless of which participant is involved, a study must have a timeslot available in order for the participant to sign up. If a study is a two-part study, the system will check to see that there are available timeslots for both parts of the study, and also that there is at least one available second-part timeslot to match up with a first-part timeslot. Sometimes, researchers may set up a two-part study with specific day separation restrictions between the two parts, but then fail to add second-part timeslots that are in the dates to meet that day separation.

The specific configuration refers to configuration items which may prevent some (but perhaps not all) participants from seeing or signing up for the study. These are items like prescreen participation restrictions or an invitation code. This provides some information about what restrictions are in place.

Then if you would like to see why a specific participant can or cannot sign up for the study, there is an option to type in their user ID and the system will provide information about why that specific participant is or is not qualified for the study.

Batch Study Updates

If you would like to modify key attributes about many studies at once, you may do so using the Batch Study Update feature. This allows you to adjust whether a study is active and/or approved, the study's timeslot usage limit (if applicable) and the study's IRB expiration date for any studies you select, all at once. The IRB expiration date will only show if Strict IRB Mode is enabled in System Settings.

To access this feature, go to Studies | View All Studies | Batch Study Update. Adjust the studies as you desire, and click Save Changes to save your changes. You may also adjust all studies at once to the same specified setting or value using the options at the bottom of the page. You may also choose to view only studies that need approval. Finally, there is an option to email researchers notifying them that their study was approved. This email will only be sent if the study was in fact just approved, and was not previously approved.

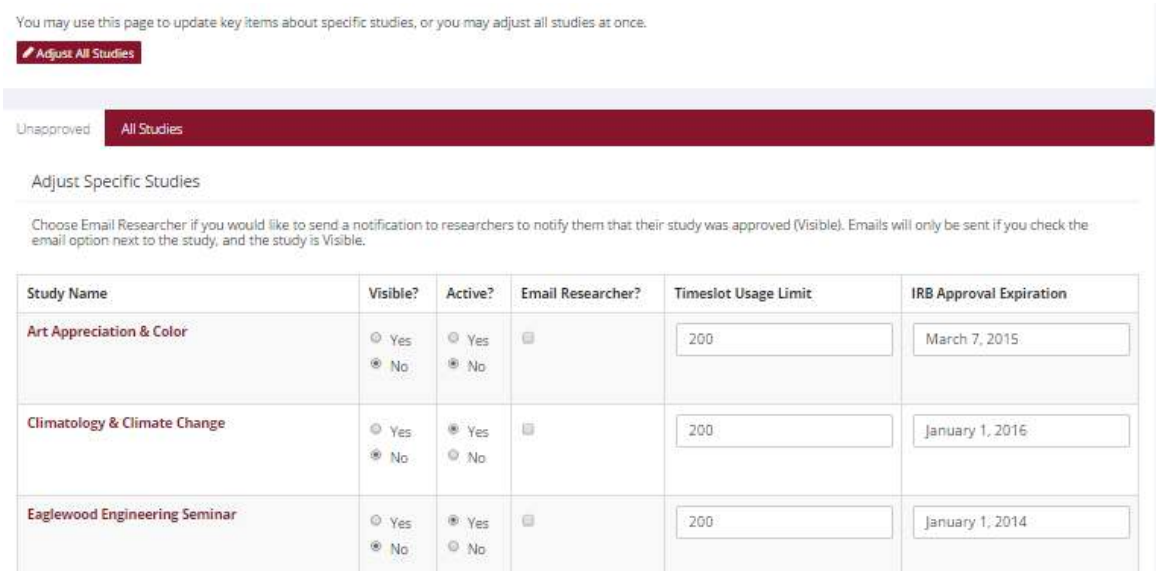


Figure 67 - Batch Study Update

Batch Study Deletion

If you typically delete all studies at the end of each semester, then instead of deleting studies selectively, you may find it better to do end-of-semester maintenance instead.

The batch study deletion feature is useful if studies are retained from semester to semester, but some studies are no longer running. You can then selectively choose old studies for deletion. Deleting old

studies is a great way to improve system performance, since there is often a lot of data associated with those studies (like signup data) and deleting old data helps the system to run faster.

To access this feature, go to Studies | View All Studies | Batch Study Delete. You will see a list of studies *eligible* for deletion. A study is eligible for deletion if it has no pending sign-ups (sign-ups awaiting action), no (non-zero) credit grants, and no unexcused no-shows linked to it. Generally, the reason a study does not appear on this list is that it has credit grants linked to it. The best way to clear the credit grants linked to a study is to do end-of-semester maintenance first. You can choose to either delete participants (which removes their sign-up data for studies and thus credit grants), or retain their accounts but zero-out their participation history (this is an option in Advanced End-of-Semester Maintenance). In fact, most administrators do end of semester maintenance first, and then do batch study deletion. End of semester maintenance can make more studies eligible for deletion.

Additional information about each study is also listed. The date of the most recent available timeslot is listed, but be aware the study may have more recent timeslots that are full. If a date is listed that is in the future, this is an indicator that the study may still be running, so you should be careful before deleting it. It's best to click on each study and review it before deciding to delete it. The IRB expiration date (when applicable) is also listed, as knowing that a study's IRB approval expired a while ago may be an indicator that it is a strong candidate for deletion.

The last activity date shows the last date when there was activity on the study. This date is updated in the following situations: the study information is modified; a participant signs up or is signed up for the study; a participant cancels or is cancelled for the study; a timeslot is modified or added; prescreen restrictions are changed; an online survey study is modified. This is probably the most accurate measure of if there has been activity for the study, and a good guideline to use about if the study is worthy of deletion. If no date is listed, then the study has not had any activity since July 2012 (when the tracking feature was added) and it has no timeslots – a good candidate for deletion.

If there are many studies in the system, the list may be divided into pages. If this is the case, you may delete one page worth of studies at a time, for system performance reasons. You can then easily go back and delete more studies.

If you have let this get out of hand and there are more than a few hundred studies eligible for deletion, the system may not be able to delete the studies due to there being too much data in the system. In this case, contact Technical Support and we can run a script to delete the studies directly in the database.

Updating System Text

There are a few areas in the system where you may specify text to be displayed on-screen or included in an email notification. All of these can be set by going to Tasks | Mass Email and Announcements | Update System Text. All are optional, and you may just leave them blank if you desire. Each item has a limit of 15,000 characters.

The text here is not language-specific, so if you have a language other than English enabled on your system, you may want to add in text in both languages for the relevant items.

Some of the items allow you to specify basic HTML (and are noted appropriately), and a basic HTML guide is included on the screen. On the items that allow for HTML, if you would like to include a link to a website, you can use a simple HTML link. For example, if you would like to link to `http://www.myschool.edu/rules.html`, you would use this HTML text:

```
<A TARGET="_blank" HREF="http://www.myschool.edu/rules.html">Link Here</A>
```

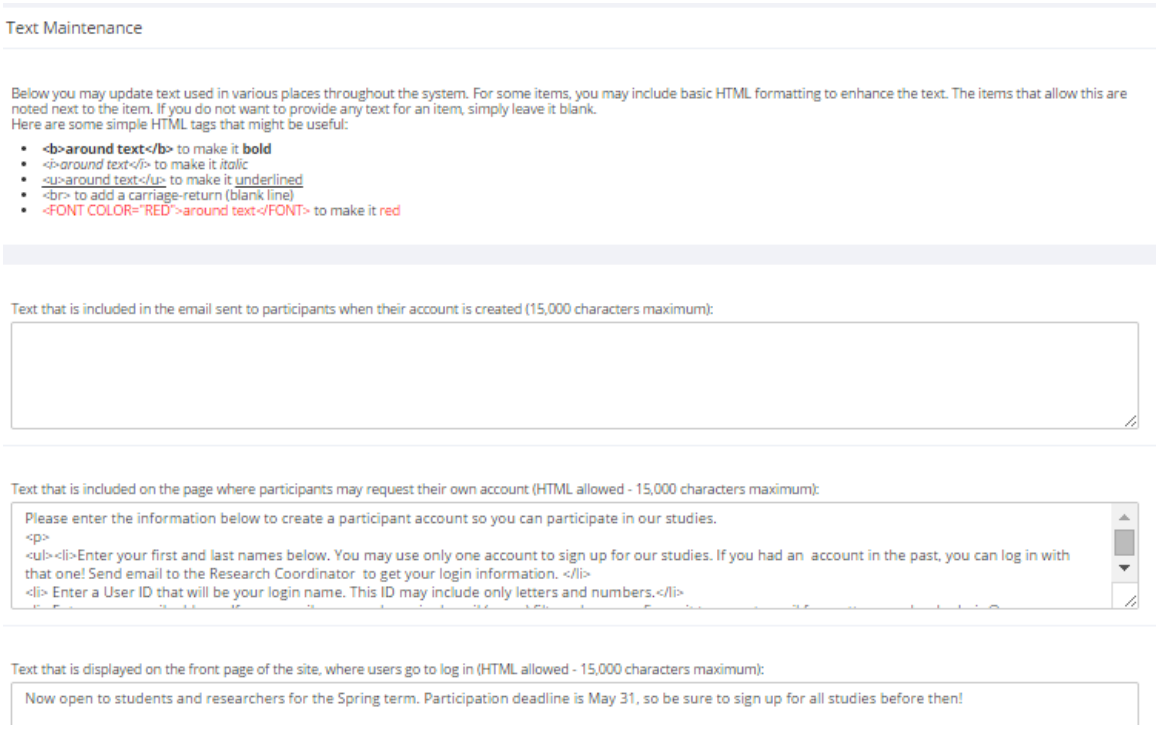
The text above should appear on one line (i.e., without any carriage returns), and can be modified if needed.

All changes take effect immediately after you save the changes.

The text you may change includes:

- The text that is included in the email sent to participants when their account is created. Here you may want to let them know about any special instructions or policies that they as new participants may not already be aware of.
- The text that is displayed on the page where participants may request their own account (applies if Participant Account Self-Creation is enabled in System Settings). Here you may want to outline any policies the participant must adhere to by registering with the system.
- The text that is displayed on the front page of the site (to the right of the login box). Here you may want to list any special announcements or login instructions.
- Text that is displayed on the main page participants see after they log in. This appears in the top right of the participants' dashboard and is a great place to put information that is intended for participants only.
- Text that is displayed on the main page non-participants (researchers, principal investigators, instructors) see after they log in. This appears in the top right of their dashboard and is a great place to put information that is intended for them and not participants.
- The text that is displayed when participants view the Human Subjects/Privacy Policy. This text was pre-filled with default text based on Human Subject Policy Type value in System Settings at the time your site was set up.
- The text that is displayed when non-participants view the Human Subjects/Privacy Policy. This text was pre-filled with default text based on Human Subject Policy Type value in System Settings at the time your site was set up.
- The text that is displayed on the page where participants view their credit status. Here you may want to remind them of any special policies.
- The text that is displayed on the page where researchers can request approval of their study. Here you may want to remind them of how studies should be properly set up according to your policies, and also what information they should include in their approval request.
- The text that is displayed to participants on the page where they view the list of available studies. It may be useful to remind them to check back routinely if they don't see any suitable studies at the moment.

- The text included in the email that is sent when a participant signs up for a study. This email is only sent if sign-up confirmation emails are enabled in system settings.
- The text included in the email that is sent when a participant is granted credit for a study. The email is only sent if Credit Notification is enabled in System Settings.
- The text included in the email that is sent when a participant is marked as an unexcused no-show. The email is only sent if Credit Notification is enabled in System Settings. This is a great place to remind participants of any consequences from accruing an unexcused no-show.
- The text included in the email that is sent when a participant's account is Limited (may only sign up for research alternative studies) due to accruing excessive no-shows. This email is only sent if No-Show Account Limit is enabled in System Settings.
- The text included in emails notifying a participant when a researcher has cancelled their sign-up for a study. This may be useful to notify a participant of any special rights they have when the researcher has chosen to cancel their sign-up on their behalf.
- The text displayed at the bottom of every page on the site, along with the administrator's email address. This will contain default text of "Email questions to" but can be changed if necessary. The email address comes from the Administrator Reply-To Email setting in System Settings.


Text Maintenance
Below you may update text used in various places throughout the system. For some items, you may include basic HTML formatting to enhance the text. The items that allow this are noted next to the item. If you do not want to provide any text for an item, simply leave it blank.
Here are some simple HTML tags that might be useful:
around text to make it bold
around text to make it italic
<u>around text</u> to make it underlined

 to add a carriage-return (blank line)
<FONT COLOR="RED">around text</FONT> to make it red
Text that is included in the email sent to participants when their account is created (15,000 characters maximum):
Text that is included on the page where participants may request their own account (HTML allowed - 15,000 characters maximum):
Please enter the information below to create a participant account so you can participate in our studies.
<p>
Enter your first and last names below. You may use only one account to sign up for our studies. If you had an account in the past, you can log in with that one! Send email to the Research Coordinator to get your login information.
 Enter a User ID that will be your login name. This ID may include only letters and numbers.
Text that is displayed on the front page of the site, where users go to log in (HTML allowed - 15,000 characters maximum):
Now open to students and researchers for the Spring term. Participation deadline is May 31, so be sure to sign up for all studies before then!

Figure 68 – Updating System Text

Frequently Asked Questions Feature

The easiest way to provide users with answers to common questions is through the Frequently Asked Questions (FAQ) feature. Using the FAQ feature, you may enter a set of questions and answers, and specify for each entry what group of users is allowed to see that item. For example, you may want to restrict certain entries so only researchers (and not participants) may see them.

As an administrator, you may view the FAQ for all types of users. Researchers and principal investigators may view the participant FAQ. In all other cases, the users may only view the FAQ for their own user type. The FAQ will only appear as an option for users if there is a FAQ available. For example, if there is no instructor FAQ, then the link will not appear for instructors.

To update and add new items to the FAQ, go to Tasks | Mass Email and Announcements | Frequently Asked Questions. From there, you may view all FAQ entries, and add, update, or delete entries. You may include HTML in the FAQ answer area, but please be sure you know what you are doing. If you would like to add a carriage-return (paragraph break), simply type in "<p>" (without the quotes). Each answer has a limit of 15,000 characters.

FAQ entries are displayed to users in alphabetic order based on the question text. To set a specific order for questions to be displayed, simply add a number in front of each question (like 1, 2, 3) as that will influence the alphabetical ordering.

Requesting Technical Support

The software features an automated support request feature. If you have a problem or question about the software, go to Administrator | Help and Documentation | Contact Technical Support. Please provide as much detail about the problem as possible. For example, reporting a problem like "A researcher said some participant was not able to cancel some timeslot." is not very helpful, while including all relevant information, like study name, timeslot date, etc. makes it a lot easier for us to provide an accurate response.

There is also a link to a system diagnostics page, which includes an option to test out the email feature within the system to verify that it is working. You can enter any destination email address, and the system will send an email to that address. This is a good way to verify that emails are indeed working. In nearly all cases, when there are reports of emails from the system not being received, it is simply that the email did arrive but was misfiled in the recipient's junk mail folder.

We provide support for administrators only, since we are not equipped to answer policy questions. If a researcher has a question, you can send it to us and we can send you a response. You can then keep this response on file in case another researcher has the same question.

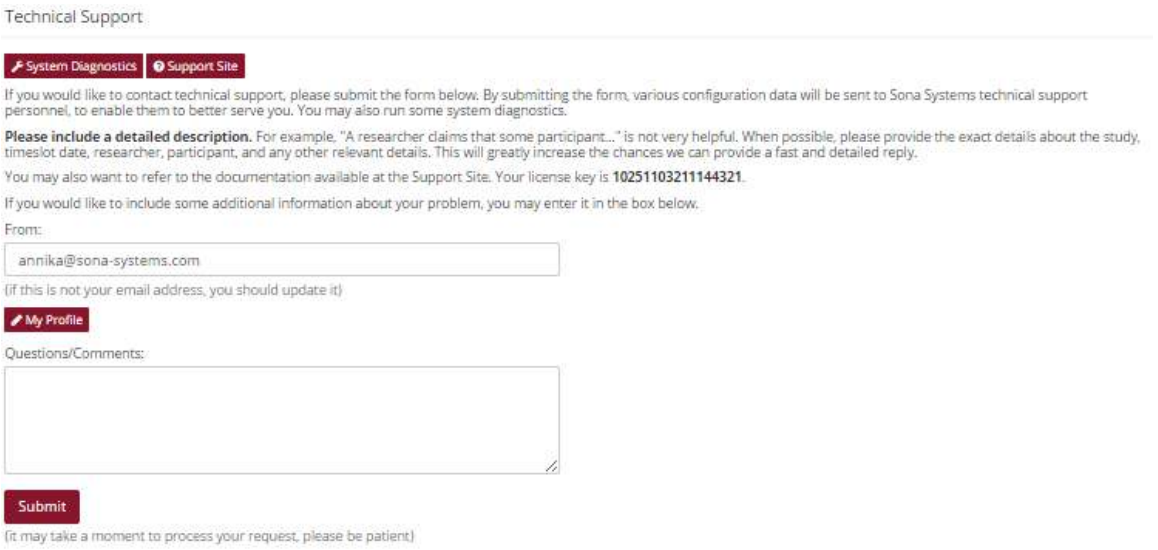

Technical Support
System Diagnostics
Support Site
If you would like to contact technical support, please submit the form below. By submitting the form, various configuration data will be sent to Sona Systems technical support personnel, to enable them to better serve you. You may also run some system diagnostics.
Please include a detailed description. For example, "A researcher claims that some participant..." is not very helpful. When possible, please provide the exact details about the study, timeslot date, researcher, participant, and any other relevant details. This will greatly increase the chances we can provide a fast and detailed reply.
You may also want to refer to the documentation available at the Support Site. Your license key is 10251103211144321.
If you would like to include some additional information about your problem, you may enter it in the box below.
From:
annika@sona-systems.com
(if this is not your email address, you should update it)
My Profile
Questions/Comments:
Submit
(it may take a moment to process your request, please be patient)

Figure 69 - Technical Support Request

Frequently Asked Questions (FAQ)

I have a few people who act in multiple roles (e.g. researcher and administrator). How should I create their account in the system?

You should create two accounts for them, as each user type has a different set of privileges. See the Duplicate User IDs section of this documentation for more information.

I would like to deduct or add credit from a participant. How do I do this?

The easiest way is through the non-study credit grant feature. You have the option to grant a negative credit if you would like to deduct credit, or you may grant a positive credit. See the Granting Non-Study Credit section of this documentation for more information.

A participant failed to show up for a study and did not properly cancel, but there were extenuating circumstances and we would not like to penalize the participant. How should this be handled?

Researchers should take some action on every study timeslot that has occurred. The best option is for the researcher to mark the sign-up as an excused no-show. This has no negative effect, and the participant may sign up for the study again.

The reason to always properly indicate a no-show for a participant is that the system makes certain pre-requisite enforcement decisions (and other decisions) that depend on whether the participant participated in the study or was a no-show.

You may also cancel the participant's sign-up, if appropriate.

I want to change the number of credits a participant must complete, for a particular participant (as opposed to changing the default setting). How do I do this?

Edit the participant's record (see Editing Users) and you can adjust their credit requirements. Partial credits are allow up to two decimal points of accuracy (e.g. 0.5, 1.25, etc.).

Participants go to create their own accounts, but no courses show up on the account request form and they see an error instead. What is wrong?

You need to create at least one course that is Selectable. See Course Maintenance in this documentation for more information.

I would like to export a copy of the data, for archival purposes. How do I do this?

You can use the Data Export feature for this, at any time. See Exporting Data in this documentation for more information.

One of our researchers works for a different organization, and thus they do not have an email account in our organization's email system. How do I setup their account?

When you create their account, choose a username that is not already used and is not a currently valid email account. Then, specify their real email address (at the other organization) in the Alternate Email field. By specifying the alternate email address, the alternate email address will be the address that is visible to other users of the system.

Can there be different sign-up or cancellations deadlines for each study?

Yes, if study-level deadlines are enabled on your site (see System Settings).

I forgot to do end of semester maintenance, and the new semester has already started. Participants are able to see and use credits earned last term in the current term. How can this be prevented?

Your options to do end of semester maintenance are limited once the new semester has started, since most options will operate on the current sign-ups as well. If you contact Technical Support, we can run a script within your system to zero out all credits earned prior to a specified date. That at least will prevent double-counting of credits, and then you can properly perform end of semester maintenance later on when the current term ends.

Can a participant who earned a no-show sign up for the same study again?

Yes, because they did not participate the first time. This assumes there is no other reason they cannot participate, like their account becoming Limited. The reason the system allows them to sign up again is that typically participants who do not show up are not targeting a particular study. In other words, they would no-show for any study, not just one particular study, so there is no reason to block them from a

particular study due to a no-show. Instead, they should be restricted system-wide, if necessary, which is done using the Account No-Show Limit.

I have sent the user their login information, but they say the password doesn't work. How do I resolve this?

Sometimes what can happen is the administrator and the user end up stepping over each other's work. In other words, the use may use the Forgot Password feature to reset their password, and in the meantime the administrator has reset the password as well, so the password is reset twice. Sometimes it may be easier just to look up the user's account in User Management, then manually set a new password for them (type it in), and then email it to them directly from your email account instead of via the system. Before doing so, test the password works. This way, you know you're sending a working password, and also via the same method you are already using to communicate with them.

System Settings

System settings are accessed by going to Set Up | System Settings.

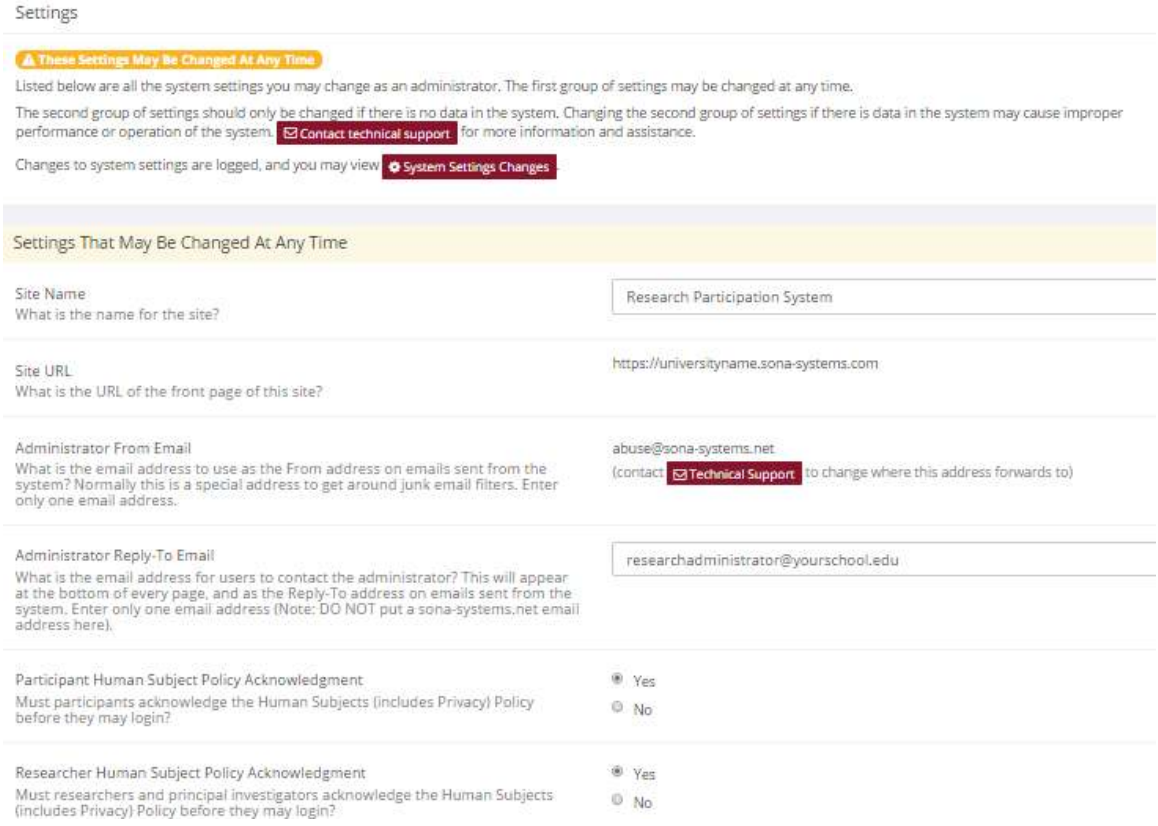

Settings
These Settings May Be Changed At Any Time
Listed below are all the system settings you may change as an administrator. The first group of settings may be changed at any time.
The second group of settings should only be changed if there is no data in the system. Changing the second group of settings if there is data in the system may cause improper performance or operation of the system. Contact technical support for more information and assistance.
Changes to system settings are logged, and you may view System Settings Changes.
Settings That May Be Changed At Any Time
Site Name
What is the name for the site?
Research Participation System
Site URL
What is the URL of the front page of this site?
https://universityname.sona-systems.com
Administrator From Email
What is the email address to use as the From address on emails sent from the system? Normally this is a special address to get around junk email filters. Enter only one email address.
abuse@sona-systems.net
(contact Technical Support to change where this address forwards to)
Administrator Reply-To Email
What is the email address for users to contact the administrator? This will appear at the bottom of every page, and as the Reply-To address on emails sent from the system. Enter only one email address (Note: DO NOT put a sona-systems.net email address here).
researchadministrator@yourschool.edu
Participant Human Subject Policy Acknowledgment
Must participants acknowledge the Human Subjects (includes Privacy) Policy before they may login?
Yes
No
Researcher Human Subject Policy Acknowledgment
Must researchers and principal investigators acknowledge the Human Subjects (includes Privacy) Policy before they may login?
Yes
No

Figure 70 - System Settings

System settings are organized into two sections. The first section contains settings that may be changed while there is data in the system. The second section contains settings that should *only* be changed if there is no data in the system. Do *not* change this second group of settings at any other time, as it can lead to corruption of data, as well as unexplainable results. If you would like to change a system setting from the second section while there is data in the system, contact Sona Systems

technical support *first* and we can provide guidance on how to safely change these settings, as sometimes we need to make an adjustment directly in the database first. In many cases you will be given the OK to make the change on your own, but it depends on how you'd like to change the setting (from what to what), so please include that information as well. Generally, just about all settings can be changed and there will be no loss of data, but some may require a few adjustments in the database first.

Changes to system settings are logged, and a record of the last 50 changes is kept. You may view this at System Settings Changes when going to System Settings. Note that the logs use the internal codes for each setting name and value, so if you have trouble interpreting the meaning, please contact Technical Support for an explanation.

Changes you make will be reflected immediately after you save the changes. All settings are required unless otherwise noted.

Settings That You May Change at Any Time

Setting Name	**Description**
Site Name	The name of the system. This is used throughout the system as the header/banner at the top of the screen. It is also the From: name on emails generated by the system. Most organizations choose a name that includes "System" at the end (e.g. "Research Participation System") but such a naming convention is not mandatory.
Site URL	The URL (web address) for the site. This is used in emails sent to users with their login information, and in some other places throughout the system. The URL should start with the conventional https:// to indicate it is a URL. If you would like to change the address of your site, please contact technical support as this will require some adjustments on the server.
Administrator From Email	A special email address which forwards to the administrator. This is used as the From (sender) address on all system-generated emails, including credit notifications, login information reminders, and study reminders. The email address ends in @sona-systems.net, and this is done to comply with bulk email sending standards such that we must send emails using our own domain and not that of a university. When the system sends email where the From address is an @sona-systems.net address, then these emails are specially

	signed using both DomainKeys and DKIM technologies, and are both Sender ID and SPF compliant. These techniques are invisible to the user, but improve the chances that the email will not be misclassified as junk mail. Any email sent to the @sona-systems.net email address specified here will forward automatically to the email address specified in the Administrator Reply-To Email setting (see below).
Administrator Reply-To Email	The email address where users should write if they have questions about the system (i.e., the administrator's email address). This is likely a university email address, and cannot be an @sona-systems.net address. Automated emails from the system will have this email address specified as the "reply-to" address, which means when a user responds to such an email, their response will go to the Administrator Reply-To address. This address is also displayed at the bottom of every page on the site, so users can easily contact the administrator if they have any questions. In some user-initiated emails, like if a researcher is sending a prescreen participation invitation, the reply-to address will be set to that of the user initiating the email.
Participant Human Subject Policy Acknowledgment	Yes or No value to indicate if participants must acknowledge the Human Subjects/Privacy Policy before they may use the system. If set to Yes, they must acknowledge it once every 6 months, and their acknowledgment status will be listed in their record when the Administrator views it. If you handle this type of acceptance before-hand (on paper, for instance), then it is usually not necessary to enable this feature.
Researcher Human Subject Policy Acknowledgment	Yes or No value to indicate if researchers and principal investigators (when applicable) must acknowledge the Human Subjects/Privacy Policy before they may use the system. If set to Yes, they must acknowledge it once every 6 months, and their acknowledgment status will be listed in their record when the Administrator views it. If you handle this type of acceptance before-hand (on paper, for instance), then it is usually not necessary to enable this feature.
Human Subject Policy Type	This setting is only used when initially generating the human subjects/privacy policies in the system. Choose the research and privacy regulations that your organization must comply with. The choices are United States (HIPAA and Common Rule), United States

	(Common Rule only), Canada (PIPEDA and Tri-Council Statement, European Union (OECD and EU Directive), or Australian (OECD). The different choices here affect the text users see on the Human Subjects/Privacy Policy, but this is only set at the time the system is first set up. If you change this, you may need to update the text in these policies. See Updating System Text for further information. If you have changed this setting and would like standard text based on the new policy type, contact Technical Support and we can provide this to you.
IRB Name	The name of the group that reviews studies from an ethical standpoint. Usually called an IRB, REB, or HSB. The name may be up to 20 characters, and this name will be used when identifying the IRB to researchers and participants. Use of an acronym is recommended to save screen space.
Default Study Length	The default length of time for a study, in minutes. Researchers may change this value on a study-by-study basis.
Sign-Up Time Threshold	The latest time before a study is to occur that a participant may sign up for a study. You may choose a rolling time window (e.g. 24 hours before the study is scheduled to occur), a fixed time (e.g. 5pm the day before), or allow this to be specified on a per-study basis. The fixed time setting always indicates the day *before* the study is to occur, unless Time Threshold Includes Weekends is set to Yes (see below).
Cancellation Time Threshold	The latest time before a study is to occur that a participant may cancel their sign-up for a study. You may choose a rolling time window (e.g. 24 hours before the study is scheduled to occur), a fixed time (e.g. 5pm the day before), or allow this to be specified on a per-study basis. The fixed time setting always indicates the day *before* the study is to occur, unless Time Threshold Includes Weekends is set to Yes (see below).
Time Threshold Includes Weekends	Yes or No value to indicate if the system should factor in weekends when enforcing the sign-up and cancellation time limits. If set to Yes, then a deadline that would ordinarily occur on a weekend is pushed back to the Friday before the weekend. The system will push back the deadline in full days, so a rolling time window threshold that would occur at 2:30pm on Sunday would be moved to 2:30pm on Friday. If set to No, the deadline may occur on a

	weekend. The system considers Saturday and Sunday to be the weekend.
Random Study Order	Yes or No value to indicate if the system should list studies (to participants) in random or alphabetical (by study name) order. All non-participants will always see studies listed in alphabetical order. If random order is chosen, the list of studies is displayed in random order for each participant. The random order is computed for the participant when they log in, and the same order is preserved for that participant for the next 5 minutes, then it is recomputed again.
Credit Display	Yes or No value to indicate if the credit value for studies should be listed on the study listing page, for participants. The credit value will always be visible once a participant clicks on a study to learn more about it. The reason to disable the credit display from the main study listing page is if there is a concern that participants are more or less likely to view studies that have a higher credit value. If set to Yes, the credit value will be displayed on the study listing page. This setting also applies to paid studies in the same fashion. The payment value will not be displayed on the list of studies if this setting is set to No.
Available Study Display	Yes or No value to indicate if all (active, approved) studies should be displayed to participants when they go to view the list of studies. If set to No, then only those studies with available timeslots will be listed. It may be useful to set this to Yes if there are frequent changes in timeslot availability and you want to make a participant aware of studies even if there are no timeslots available at the moment.
Online Study Display	Yes or No value to indicate if on the list of studies displayed to participants, participants can see immediately if the study is an online study. If this is set to No, there will be no indication on the page listing all the studies to participants that the study is an online study. This may help to reduce selection bias. Regardless of this setting, once the participant clicks on a specific study, they will see at that point if it is an online study, as they need to know this for logistical reasons.
Participant Progress Display	The starting date to display activity when a participant views their

	progress. Activity prior to this date will not be displayed unless the participant clicks an option to do so. This is useful to avoid clutter and confusion on this page, if older studies are kept in the system for archival purposes.
Pre-Requisite/Disqualifier Display	Yes or No value to indicate if participants can see the study pre-requisites and disqualifiers for a study. If set to Yes, then when participants view a study with study pre-requisites or disqualifiers, they will see the list of those studies and also whether or not they satisfy each requirement. If set to No, then the system will indicate if they are not eligible due to study pre-requisite or disqualifier restrictions, but not state which studies are the reason they do not qualify. The benefit to setting this to No is if there is a risk to the research quality if participants know which studies are related. The benefit to setting this to Yes is that there are likely to be fewer questions from participants asking why they cannot sign up for a certain study. The Pre-Requisite feature must be enabled for this setting to work.
Variable Credit Grant	Yes or No value to indicate if researchers can grant partial credit to a participant for study participation. If set to Yes, researchers can grant from 0 credits to 2 times the study's credit value. This is useful when a study runs longer than expected or a participant leaves the study early. The various credit values that can be granted within the acceptable range depends on the Credit Increment setting.
Instructor Study Viewing	Yes or No value to indicate if instructors can view the studies available in the system. This is useful if instructors would like to know what studies are available so they can integrate such information into their instruction. Even if this feature is enabled, instructors still cannot see any timeslots nor who has signed up for the study, for privacy reasons. If set to No, instructors may not view any studies.
Instructor Credit Grant	Yes or No value to indicate if instructors can grant non-study credit grants to participants (students) in their courses. This feature is useful if credit for a research alternative is handled directly by the instructor. If set to No, this feature will not be available to instructors, but still remains available to the administrator.
Sign-Up/Cancellation	A choice indicating if the system should email a participant with a

Confirmation Email	confirmation of their study sign-up, immediately after they sign up. It can also be sent when the participant cancels their sign-up. Note that when someone other than the participant cancels the sign-up (e.g. the administrator or researcher), a confirmation email is *always* sent since the participant may not otherwise be aware of it.
Daily Schedule Contact	The email address of the person who should receive an email listing all appointments scheduled for the following day. This can be useful to have sent to someone working at the front desk of the department, in case a participant comes in and has forgotten in which room their study takes place. The information in this email is similar to the Study Schedule Report. You may provide only one email address. If you want this email to go to more than one person, ask your IT department to set up a special email address (commonly called a forwarder or alias) that sends to multiple users via one email address. This field is optional.
Automatic Reminder Email	Yes or No value indicating if the system should send a reminder email to participants the day before they are scheduled to participate in a study. If set to Yes, an email will be sent automatically the day before their appointment.
Automatic Reminder Email Delay	The number of hours the system should hold the study reminder emails in the queue before sending them. This is useful if participants are more likely to pay attention to an email if it is received at a certain time of day. The emails are usually sent at 5:00pm New York time for most customers in North and South America; at 12:00pm (noon) New York time for most customers in Europe and the Middle East; and at 5:00am New York time for most customers in the Asia Pacific region. If a delay is specified, the emails will still be generated at that time, but will be held in the email server queue until the specified delay is reached.
Credit Notification Email	Yes or No value indicating if the system should send an email to the participant when they are granted (or revoked) credit for a study. If set to Yes, an email will be sent. This applies to all studies for credit, and to paid studies only when the participant is marked as an unexcused no-show, and the No-Show Account Limit is enabled.
No-Show Account Limit	A numeric value indicating after how many unexcused no-shows a

	participant's account is automatically Limited so that they may only sign up for studies marked as a Research Alternative. If set to any value above 0, the system will set the account to Limited as soon as the participant accumulates or exceeds the value in unexcused no-shows. An email is sent to the participant when this occurs. An email will also be sent to the administrator, if the Administrator No-Show Notification Email is set appropriately.
Administrator No-Show Notification Email	A numeric value indicating after how many unexcused no-shows a participant receives should the administrator be notified by email. Some schools like to disable a participant's account or limit them to only research alternative studies after they accumulate a certain number of unexcused no-shows. The administrator should review the participant's account before deactivating it, in case there are extenuating circumstances. Set this value to 0 to disable the feature. If set to any value above 0, the administrator will be emailed as soon as a participant accumulates or exceeds the specified unexcused no-show value. See No-Show Handling for more information.
Administrator Account Notification Email	Yes or No value indicating if the system should email the administrator every time a new account is requested (by a participant). If set to Yes, an email will be sent. Many schools choose to disable this feature when the term is starting, as the administrator is frequently logging onto the site and checking for new accounts. As the term progresses, they enable this feature so they are aware of any account requests, as they trickle in mid-term. This feature only applies if Participant Account Self-Creation is enabled. The email includes some additional information, like the IP address of the computer used to request the account, and also a list of any other accounts in the system with the same name (first name and last name). This information may be useful in identifying potential duplicate account requests or fraud.
Administrator Pending Timeslots Email	A choice indicating if the system should send a notification email to the administrator if there are pending (uncredited) timeslots in the system more than 2 days old that have not been dealt with. You may choose to have this sent for all studies, or only non-online studies. The reason not to enable this notification for online studies is that online study notifications are considered eligible (for a

	notification to be sent) as soon as the sign-up has occurred, since it is difficult to determine when the sign-up occurred within or outside the two-day threshold. This email is sent once per day, and only if there are timeslots that meet the criteria.
Automatic Account Approval	Yes or No value indicating if participant account requests should be approved immediately, without administrator intervention. This feature only applies if Participant Account Self-Creation is enabled. To receive notification of these automatic approvals, enable the Administrator Account Notification Email setting.
Automatic Credit Granting	Numeric value indicating whether the system should automatically grant credit to a participant if the timeslot is more than X hours old, and the researcher has taken no action. The value for X indicates the number of hours old a timeslot must be before it qualifies for an automatic credit grant. For example, if this was set to 5, then only timeslots more than 5 hours old qualify for the automatic credit grant. The automatic credit grant occurs once a day, usually around the same time that appointment reminders are sent. The automatic credit grant also takes place for studies that are for pay, and it also grants credit for online studies, once the participation deadline has passed. Researchers can always override an automatic credit grant later, if necessary, and they may also disable this feature for their study. Set this value to 0 to disable the feature system-wide.
Automatic Credit Grant Administrator Email	Yes or No value indicating if the administrator should receive an email with information about all studies where automatic credit grants occurred. This is useful to keep track of situations where researchers are not granting credits in a timely manner. Only applies if Automatic Credit Granting is enabled.
Lost Password Feature	Yes or No value indicating if the Lost Password feature should be enabled. If enabled (set to Yes), users may have their password reset and a new password emailed to them through a link on the front page of the site, if they forget their password. Typically, the only reason to disable this feature is if accounts have been set up with a special password scheme and those passwords should not be changed, which is what would happen during a password reset.
Change Password Feature	Yes or No value indicating whether participants are allowed to change their password after their account is initially created. Generally this should be set to Yes, but some organizations set it to No if they have created participant accounts using a specialized

	password scheme, or do not want participants to be able to change their password from the assigned password. See Security Considerations for more information.
Change Password Requirement	Yes or No value indicating whether participants are required to change their password after their first login. See Security Considerations for more information. Only applies if Change Password Feature is enabled.
Study Approval	An option indicating if the administrator must approve a study before it is made visible to participants. This can be turned off entirely, enabled only when a study is added, enabled when a study is added or updated, or enabled when a study is added with an email sent to the administrator upon an update. Approval is controlled by the Approved field in a study, not the Active/Inactive setting for a study (which researchers control). A study is considered "updated" if any of the descriptive text fields (name, descriptions) are updated. More specifically, a study will require re-approval by the administrator if this setting is set so that a study requires re-approval when the study is updated, and at least one of the following fields about a study are changed: study name, brief abstract, detailed description, eligibility requirements (the text field, not specific restrictions like prescreen restrictions, study pre-requisites/disqualifiers, or course restrictions), duration, preparation, credit value (for credit studies only), payment value (paid studies). If the setting is set so that on an update, the administrator merely receives a notification but no re-approval is needed when a study is updated, then an email notification to the administrator will detail the changes made to the relevant fields. This email notification will *not* be sent to the Study Approval Contact, even if one is specified.
Study Approval Contact	If studies require approval by an administrator before being approved so it is visible to participants (see Study Approval setting), then you may specify the email address of where these approval requests should be sent. In some cases, the main administrator for the site is different from the person responsible for approving studies, which is why this may be useful. If this is the same person, leave this blank and the email will go to the administrator. If an email address is specified here, be sure the email address is

	that of someone who has administrator access to the system so they can actually approve the studies. Only an email address should be entered here, and not any additional text like a name.
Study Scheduling Deadline	If enabled, the system will prevent timeslots from being scheduled to take place after the date specified. This is typically set to a date like the end of the semester, and it ensures that researchers do not schedule timeslots to take place after the semester is over and credits must be finalized.
Researcher Manual Sign-Up/Cancellation	An option indicating if researchers can sign up and/or cancel a participant for their study. The sign-up option is useful if researchers have a need to override a study's restrictions (pre-requisites or sign-up deadlines, for example), which participants cannot do. The option can be turned off, set to Sign-Ups only, Sign-Ups and Cancellation, or Sign-Ups and Cancellation with an email notification to the administrator when there is a cancellation. Even if the feature is disabled, the administrator can still perform the function if necessary. During a cancellation, the participant *always* receives an email notification, along with a confirmation code, to help in settling any disputes that may arise. The manual sign-up feature for a study is not available to researchers if a study has not been approved and it requires approval by the administrator (Study Approval setting). This is to ensure that no sign-ups can occur prior to a study receiving approval. While researchers can sign up a participant for their study even if the participant does not meet the study's requirements, they may not sign up the participant if the sign-up would cause the participant to exceed their credit limits. Only the administrator may sign up a participant for a study that would cause the participant to exceed their credit limits.
Researcher Reminder Email	Yes or No value indicating the *default* value when a new researcher account is created. If set to Yes, researchers will receive an email the day before they have studies scheduled, as a reminder. They will also be sent an email if they have any timeslots for lab studies more than 2 days old that have not been dealt with, as well as for online studies regardless of age. Researchers may override the default setting individually, if they so

	desire, by going to their profile.
Participant Upper Case Names	If set to Yes, then when a participant account is added, their name will be converted to UPPER CASE. If set to No, then their name will be saved in Proper Case.
Participant Display Order	The order that participants are displayed when researchers view a list of who has signed up for their study. Names can be ordered by first (given) name or last name (surname). If Anonymous ID codes are enabled, then researchers will not see names, in which case this setting would only apply to the administrator, since the administrator can always see participant names. In this situation, researchers will see the list of participants sorted by anonymous ID code.
Phone Number Display	Yes or No value indicating if researchers and principal investigators can view the phone numbers of participants who have signed up for their study. If set to Yes, the phone number is displayed, if it is available.
Participant Identification	Determines how participants are identified to researchers. The options are by Full Name, by First Name only, or by a unique, system-assigned ID code. The last option (ID code) ensures the highest level of privacy. See Participant Unique ID Codes for more information. The First Name only option is useful so researchers can identify and address participants, while still affording participants some level of privacy. However, it can also introduce complications since many participants may have the same first name, so it may be difficult to uniquely identify participants in listings of study sign-ups. For this reason, it is recommended to use either Full Name or ID code, but not just First Name. If this setting is changed while there are external web studies which make use of the auto-credit feature, the auto-credit feature will not work for participants who signed up before the change but have not yet received credit. Their sign-ups will still be recorded properly, but the researcher will need to manually give them credit. See External Study Credit Granting for more information.
Prescreen Viewing	Yes or No value indicating if researchers can view the results of an

	individual participant's prescreen, if that participant has signed up for the researcher's study. Researchers will then have access to all the responses for that participant across the entire prescreen. This setting only applies if online prescreening is enabled (see Online Prescreens). If set to No, researchers cannot view any individual participant prescreen results (though they can view aggregate results across all participants, if Prescreen Aggregate Viewing is enabled).
Prescreen Aggregate Viewing	Yes or No value indicating whether researchers can view and analyze prescreen responses for a chosen question across all participants in the system. If enabled, researchers can also download the response data for the chosen question. Participant names are not included in this data, but responses may contain identifying information if the prescreen question being analyzed asked for identifying information. This feature is useful when researchers need to analyze demographics across the entire pool, like to determine percentile cut-offs for setting up prescreen participation restrictions on their study. This setting only applies if online prescreening is enabled.
Prescreen Contact	Yes or No value indicating if researchers can contact a group of participants who meet a certain prescreen criteria, to invite them to participate in any of their studies. The email contact is made through the system in such a manner that the participant's identity is not revealed to the researcher. Some schools are required to disable such a feature, as their IRB considers it possible coercion. This setting only applies if online prescreening is enabled.
Prescreen Contact Limit	A numeric value between 1 and 9999 indicating the maximum number of participants a researcher may contact at one time, based on running a prescreen analysis and contacting those who meet their specified criteria. The limit is useful to prevent abuse, like a situation where researchers set very broad restrictions with the goal of trying to email the majority of the pool. This setting only applies if Prescreen Contact is enabled. For more information, see Invite Qualified Participants in the Researcher section of the documentation.
Prescreen Contact Admin CC.	Yes or No value indicating if the administrator should receive a copy

	(by email) of any communications sent to participants by researchers, using the Prescreen Contact feature. If set to Yes, an email will be sent to the administrator with the content of the communication, which is useful if the administrator would like to monitor the content of such communications (generally to ensure there is no coercion). The email will also contain some basic summary information about which emailing options were chosen and how many participants received the email. Even with this setting disabled, summary information about such emails are still available to the administrator in the Mass Email Report. Only applies if the Online Prescreening and Prescreen Contact settings are enabled.
Prescreen/Survey Concurrent Participant Limit	A number between 1 and 15 to indicate the maximum number of participants who can be taking the prescreen or any online survey studies at the same time. The limit is arrived at by adding up all participants taking the prescreen and any online survey studies (combined). The reason to set a low limit is for improved system performance, as too many participants may slow the system down. Those who attempt to participate after the limit is reached will be told they are temporarily prevented from participating, along with an estimate in minutes of how soon there is likely to be more space available. If the prescreen or most online surveys take a while (more than 5 minutes) complete, it is a good idea to set this limit to a low number. A list of who is currently participating is in the System Summary Report. This limit *only* applies to those taking the prescreen and online surveys. There can still be hundreds of users logged into the system at once, and they can be doing other actions like signing up for studies, checking credits, etc. To get an idea of how this limit works in practice, if the average completion time for the prescreen is 10 minutes, then the maximum throughput per hour, if the concurrent limit is set to 15, is 6 participants per hour * 15 concurrent slots = 90 participants per hour which comes to 2,160 participants who can complete the prescreen per day. If there is a deadline to complete the prescreen, you should take the throughput into account when setting the deadline.
Course Credit Reassignment	Yes or No value indicating if participants can reassign a credit from

	one course to another course they belong to. This only applies if Course Credit Assignment is enabled, and a participant belongs to multiple courses. It is acceptable and common to change this setting during the term. It is popular to keep this enabled for most of the term, and then disable it towards the end of the term so credits cannot be shuffled around while course credit reports are being run.
Course Reassignment	Controls whether participants can change which courses they are in, after their account is initially created. The three options are: • No – They cannot change which courses they are in (however, the administrator may do this for them if necessary). • Yes, Add and Remove Courses – Participants can remove themselves from their current courses, as well as add themselves to other courses. • Yes, Add New Courses Only – Participants can add themselves to other courses, but may not remove themselves from any courses they are currently in. If this setting is enabled, then a participant may change which courses they are in if <u>any one</u> of the following is true: • No-show penalties are turned off (see No-Show Penalty Credits setting) • The system is configured to assess no-show penalties, but those penalties are deducted from earned credits (see Penalty Type setting) • The system is configured to assess no-show penalties, and penalties are added to credit requirements, but the participant has not received any no-shows yet It is important to note that if a participant removes themselves from a course, and there are credits assigned to that course, then those credits will become unassigned (they will be advised about this with a warning message). Unassigned credits can be reassigned by the participant to any course they are currently in.
SMTP Relay Server Address	The hostname or IP address of the SMTP relay server used when the system sends emails. This should already be configured correctly, and should not be changed.

Current Time	Set this value to reflect the current time at your organization. This is just a time zone adjustment that is stored internally as the offset from the server's time. The time will adjust automatically during the Daylight Saving Time switch for the USA. If you are in an area that follows different Daylight Saving Time rules, please check this value on the second Sunday in March and the first Sunday in November, and adjust it accordingly.
Date Format	The format in which the system will display dates and times. Choose from North American (July 14, 2017, 1:30 PM), European (14 July 2017 13:30), or Asian (2017-07-14 13:30) formats.
Compensation Type	Text to indicate the unit used when studies are offered for monetary compensation. Usually this is the name of your local currency (Dollars, Pounds, etc.). Even if you do not currently offer studies for compensation, you should specify some value here.
Credit Type	Text to indicate the unit used when studies are offered for non-monetary compensation. Examples include "Credits" and "Points." Even if you do not currently offer studies for credit, you should specify some value here. It is not advisable to use a value that also corresponds to units of time, like "hours", because this can cause confusion between a study's credit value and its duration.
License Key	Your 17-digit license key will be provided by Sona Systems. The expiration date will be listed. If your license key has expired or is invalid, then only Administrators may log in to use the system, and all other users will be prevented from logging in.

Settings That May Only Be Changed when the System is Empty

The table below lists settings that should only be changed when there is no data in the system. It is *very important* that you do not change these settings while there is data in the system, or you may lose data and the system may not perform as expected. If you would like to change a setting, contact Sona Systems Technical Support *first* and we can help you make the necessary changes without a loss of data integrity. Often we need to make an adjustment directly in the database before the setting can be changed.

Setting Name	**Description**
@ Suffix	The @ suffix (domain) for all usernames. The system can use user

	IDs that resemble email addresses. Most schools have an email system with unique email addresses, such as "username@yourschool.edu" (in this example, the @ suffix value is "yourschool.edu"). The intention here is that user IDs must be unique in the system, so using a university's unique email user ID convention is the best way of enforcing this uniqueness. User accounts on the system are *not* connected in any way to the university email system. See the User IDs section for more information on how user IDs are handled. The value you supply should *not* include the leading "@". If you do not have a common @ suffix (domain) to map it to, you can leave this blank. If you leave it blank, the system will allow users to choose any user ID, but will also require them to provide an email address so they can be contacted by the system when necessary.
Prescreen Requirement	Must participants complete the prescreen when they first log in to the system? There are 3 options for this setting. If you would not like to use the built-in prescreen feature, then set the value to No Prescreen. If you would like to use the built-in prescreening feature, you should set this value to one of the two Online Prescreen options. If this setting is enabled but there is no active prescreen in the system, participants will be allowed to log in and sign up for studies. On subsequent logins, if a prescreen is then active and available, they will be sent to the online prescreen. See Online Prescreens for more information.
Credit/Pay Support	This setting determines if support for pay and/or credit studies should be enabled in the system. Note that this setting is mostly cosmetic, and does not change the majority of system functionality. It only changes some text and pages for participants and researchers. If pay support is turned off, then researchers cannot add studies where there is monetary compensation. If credit support is turned off, then researchers cannot add studies for credit. In addition, on pages where participants go to view their

	credit earning status, no reference to credit is made. Finally, on emails to participants confirmation participation or sign-up for a study, no reference is made in the email text to credits.
P.I. Support	Yes or No value indicating whether the P.I. (Principal Investigator) feature should be enabled. If enabled (set to Yes), you may create P.I. users, and a P.I. is required for every study. See Principal Investigator Accounts for more information.
Multiple Researcher Support	Yes or No value indicating if a study can have multiple researchers linked to it. If set to Yes, a study can have multiple researchers. Each researcher (for the study) has full and equal control over the study. If enabled, then Timeslot Usage Restrictions cannot be enabled on a per-researcher basis.
Strict IRB Mode	Yes or No value indicating if the system should operate in strict IRB mode. If set to Yes, the system will operate in strict IRB mode, which requires that each study have an IRB approval code and approval expiration date, along with some other restrictions. See the Strict IRB Mode section of this documentation for more information.
Location Scheduling	Yes or No value indicating if the system should make the location (room/lab) scheduling feature available. If set to Yes, the feature is enabled and allows researchers to pull up a list of pre-defined locations and view the availability of those locations when scheduling timeslots. See the Location Scheduling section of this documentation for more information.
Credit Increment	The acceptable credit increment for studies. Values of 0.1, 0.25, 0.5, 1, 2, or 4 are valid. The study's credit value must be set to a value evenly divisible by the credit increment. For example, if the increment is set to 0.5, then a study may have a credit value of 0.5, 1.0, or 1.5, but may not have a value of 1.25. This increment is also used for purposes of variable credit granting (see the Variable Credit Grant setting). If Variable Credit Grant is set to Yes, then the options available when granting a credit (in the pulldown box) will range from 0 – 2 times the study's credit value, in increments based on the Credit Increment. It is advisable to use as large a credit increment as possible (e.g. 0.5 instead of 0.1) as this will result in a slight performance increase for

	users.
Maximum Total Credits	This indicates the maximum total number of credits a participant may complete, and this includes any credits earned with online studies. The three possible settings here are: • Required Amount. A participant can complete only as many credits as their own credit requirements. You may view their credit requirements by looking at their Credits Needed value when viewing their record. • A fixed credit amount. You may specify a specific credit maximum, and this value can be a fractional number up to two decimal points (e.g. 1.25 or 2.5). Note that if a participant has credit requirements larger than this value, they will be allowed to exceed the value specified here up to their credit requirements. The reason is that it would be unfair to prevent a participant from meeting their credit requirements. • No Limit. When a participant goes to sign up for a study, the system factors in the effect of that study's credit value on the maximum credit limit.
Maximum Online Credits	This indicates the maximum credits a participant may complete through online studies, which includes both online external web studies and online survey studies, but not the prescreen. In some cases, it may be useful to limit participation in online studies, to ensure participants also receive experience participating in lab studies. The four possible settings are: • Not allowed to sign up for online studies for credit. It may be easier just to turn off online studies in the system instead of using this setting. • A fixed credit amount. You may specify a specific credit maximum, and this value can be a fractional number up to two decimal points (e.g. 1.25 or 2.5). • A percentage of a participant's credit requirements. This is useful when participants have a wide range of requirements. For participants with a credit requirement of 0, this means they cannot earn any credits from online studies if this setting is used, since any percentage of 0 is 0. • No Limit.
Maximum Credit	Yes or No value indicating if the system should be lenient when it

Enforcement Leniency	enforces the maximum credit restrictions (both Maximum Total Credits and Maximum Online Credits). If set to Yes, the system will be lenient and allow a participant to exceed the maximum credit in *sign-ups* as long as they do not exceed it in *granted* credits. In other words, the system will tally up only the credits earned, and not any pending credits, when determining if the limit will be exceeded. This situation may occur when a researcher has yet to credit a participant for a study a participant participated in, or a participant has signed up for more than one upcoming study (thus there are multiple credits they have yet to earn, but likely will earn in the future).
No-Show Penalty Credits	A numeric value indicating the number of penalty credits to assess when a participant does not show up for a study. If a researcher indicates a participant did not appear for a study (unexcused no-show), the participant will not receive credit for the study *and* a penalty will be assessed based on this setting. You may set this to No Penalty, a fixed penalty amount, or a penalty amount that is a multiple value of the number of credits the missed study is worth. If set to a fixed penalty value, the value can be a fractional number with up to two decimal points of accuracy (e.g., 1.25 or 2.5) and unexcused no-shows will always be penalized with the same credit amount. If set to a multiple value amount, it must be a whole number (1, 2, etc.), and the penalty is determined by multiplying this value by the study's credit value. For instance, if the multiple value is set to 2, and a participant earned an unexcused no-show on a 2.5 credit study, they would be assessed a 5 credit penalty (2.5 x 2). Assessing penalties for no-shows may not be allowed in many situations for ethical reasons, especially in the US. See the No-Show Penalties section (in Regulatory Compliance) for further information.
Penalty Type	Indicates how no-show penalties (if penalties are enabled – see the No-Show Penalty Credits setting) are implemented. There are 2 options for this: penalties increase credit requirements and penalties are deducted from earnings.

	The penalties increase credit requirements option adds on to a participant's overall credit requirements when they earn a penalty. This option is useful especially when there is objection by an IRB to the other option, which effectively results in a deduction of earned credits. One potential drawback to this option is if the maximum credit earning potential should be limited (with the Maximum Credits system setting). The system will allow a participant to exceed the Maximum Credits setting if their own credit requirements are greater than the Maximum Credits value. So, if a participant earns a lot of penalties, it may result in a credit requirements value higher than the Maximum Credits value. If there is a reason for the Maximum Credits value to be so strict (generally to limit earning potential), then this penalty type option may not be ideal. The other penalty type will deduct from a participant's credit earnings. This may result in a negative earnings value. With either option, when a penalty is assessed, no credit is granted. The two penalty type options merely determine how the penalty is applied. This setting cannot be changed if there are any penalties in the system, other than those that were retained using participation history retention (see Advanced End-of-Semester Maintenance), as retained penalties have no penalty value. The reason this setting cannot be changed if there are outstanding penalties is that it would be impossible to determine which penalties were assessed under which penalty type, which is necessary information in the event a penalty is revoked.
Study Descriptions	This setting concerns the Brief Abstract and Detailed Description fields for a study, but does not affect the study's name (which must always be provided). These two fields can be made optional, mandatory, or turned off entirely. It may be useful to turn off these descriptions entirely when it is not desirable for researchers to enter detailed information about their study (perhaps the description is coercive).
Duplicate Study Sign-Up	Yes or No value indicating whether researchers can configure their studies such that participants can participate in the same study more than once (at different times). If set to Yes, researchers have

	the option of configuring it to allow duplicate sign-ups (but they may opt not to allow it). If set to No, researchers are never given such an option, and duplicate sign-ups are prohibited. This is based on actually participating in the study. If a participant earns a no-show, they may sign up for the study again, assuming they still otherwise qualify for the study.
Passworded Studies	Yes or No value indicating whether researchers may set up studies that require a special password (for the study itself) that a participant must know before they can sign up. This is known as an Invitation Code. If set to Yes, researchers have the option of setting an invitation code for each of their studies (they may opt not to use this feature). If set to No, researchers are never given such an option, and passworded studies are not allowed.
Web Studies	Web study support may be turned off entirely, enabled for external studies only (web studies that are administered outside the system), or enabled for both external studies and online surveys administered by the system.
Pre-Requisite Feature	Yes or No value indicating whether studies may have pre-requisites and/or disqualifiers (a disqualifier is a study a participant must *not* have participated in in order to participate in a study). If set to Yes, researchers may choose as many pre-requisites and/or disqualifiers for their studies as they like (they may opt not to). If set to No, researchers are never given such an option, and pre-requisites and disqualifiers are not allowed.
Pre-Requisite Enforcement Leniency	Yes or No value indicating whether the system should be lenient in enforcing pre-requisites. If set to Yes, a participant may sign up for a study that has a pre-requisite, as long as they are *signed up* for the pre-requisite study also. If set to No, the system will be strict and a participant must have *participated in* (received credit) the pre-requisite study before they may sign up. An example where leniency might be useful is if on a Monday, a participant signs up for Study A for Wednesday, and they want to sign up for Study B for Friday. Study B has a pre-requisite of Study A. If this value is set to Yes, the participant is allowed to sign up for Study B because they are signed up for Study A. If the value is set to No, they cannot sign up for Study B until they have received credit for Study A (which will likely occur after they participate in Study A,

	on Wednesday).
Course Restriction Feature	Yes or No value indicating if the course restriction feature should be made available as a study participation restriction. If set to Yes, researchers can choose to limit participation in their studies to participants enrolled in specified courses. If a participant is not enrolled in any of the specified courses, the study will not show up on the list of available studies. Such restrictions are particularly useful when the participants span a wide range of courses, and certain studies should be off-limits to participants who may have learned about the details of a certain type of research in their courses, such that their participation may affect the integrity of the research. Course restrictions act as qualifiers not disqualifiers, so if is set so only participants in Course A may sign up, then a participant in both Course A and Course B is eligible, because they are in Course A. Additionally, course restrictions only restrict who is eligible for a study, but not which course the credit may be assigned to. This means that if a participant is eligible for a study based on course restrictions, they may assign credit for that study to any of their courses, including courses not listed in the course restrictions for that study.
Timeslot Usage Restriction	This setting may be enabled so the system enforces restrictions on the number of study timeslot hours available. It can be restricted on a per-researcher basis (a researcher has a specified number of hours to allocate across all their studies), per-P.I. basis, or per-study basis (restrictions are linked to a specific study). Only one type of restriction may be chosen (system-wide). If Multiple Researchers per Study is enabled, then the per-researcher basis for restriction is not available. This feature may also be disabled entirely. The per-P.I. option may only be selected if P.I. support is enabled in the system. See the Timeslot Usage Limit section of this documentation for more information.
Timeslot Usage Restriction Default	A number indicating the default value for the maximum number of hours available for timeslots. This only applies if Timeslot Usage Restriction is enabled. This value is only used as the default value, and it may be overridden for an individual study/researcher/P.I., depending on which type of restrictions are in place. The value specified here is in hours, and must be a whole number (e.g. 10, 25, 37).

Multiple Course Support	Yes or No value indicating whether participants may belong to multiple courses. If set to Yes, participants may belong to multiple courses. If set to No, they may only belong to one course.
Course Credit Assignment	Yes or No value indicating whether participants can assign a study credit to a specific course. This is useful when the participant is in more than one course. If set to No, course credits are assigned directly to the participant and not associated with any course. This only applies when the Multiple Course Support value is set to Yes.
Multiple Course Requirements	If a participant belongs to more than one course (Multiple Course Support must be enabled), this setting determines how their credit requirements are computed. Credit requirements are tied to individual courses. There are 3 options for how the system can compute a participant's credit requirements: 1. The sum (total) value of credits for all the courses they are in. 2. The value of the lowest credit-value course they are in. 3. The value of the highest credit-value course they are in. This computation is made only when the participant joins the course. If requirements for a course are changed later, it will not update the requirements for participants already in the course.
Participant Account Self-Creation	Yes or No value indicating whether participants may create their own accounts. See the Participant Account Self-Creation section for more information. If set to Yes, participants will see an option on the front page of the site where they may create their own accounts. If set to No, no such link or option will be available.
Student ID Deactivation	Yes or No value whether the Student (University) ID number should be disabled from the system entirely. This only applies to participant (student) accounts. Often, this is disabled if such numbers map to a participant's Social Security number, and regulations (such as FERPA) prevent collection of such data.
Student ID Requirement	Yes or No value indicating whether participants must supply their Student (University) ID number when creating an account. This only applies if Participant Account Self-Creation is enabled, and Student ID Deactivation is set to No. If the Student ID Requirement setting is set to No, participants may still supply their Student (University) ID

	number, but they are not required to do so.
Student ID Duplicates	Yes or No value indicating if the system will allow participants to create an account where the Student (University) ID is already in use by another participant in the system. If set to Yes, then duplicates are allowed. This setting only applies if Participant Account Self-Creation is set to Yes, and Student ID Deactivation is set to No.
Participant Phone Number Requirement	Yes or No value indicating if participants must also provide their telephone number when registering with the system.
Participant Account Alt. Email	Yes or No value indicating if participants can specify an alternate email address where they would like to receive email notifications from the system. One good reason to disable this option is to ensure that emails are sent to the participant's official university email account, which may be more reliable than other email accounts they may use. If set to Yes, participants are allowed to specify an alternate email address. This setting does not apply if there is no @ Suffix configured in the system (see System Settings).

No-Show Handling

The system has support for assessing a penalty when an unexcused no-show is accrued. See the settings No-Show Penalty Credits and Penalty Type in System Settings.

In many situations, assessing penalties for failing to show up for a study may not be allowed for ethical reasons. See the No-Show Penalties section (in Regulatory Compliance) for more information about in which situations this may apply.

Instead of (or in addition to) assessing penalties for no-shows, the system offers some other features for dealing with participants who accrue excessive no-shows. All these features are in full compliance with the determination letter from OHRP (see No-Show Penalties).

The first option is the Administrator No-Show Notification Email setting (see System Settings). With this, the administrator can be notified once a participant has accrued a specified number of unexcused no-shows. At that point, the administrator can either block the participant's access to the system entirely (set Login to System Allowed to No), or restrict their account so that they may only sign up for studies marked as research alternative studies (set Limited to Research Alternative Studies to Yes).

Another option, similar to the previous option, provides a more automated method of dealing with the situation. The No-Show Account Limit (see System Settings) may be configured so that a participant's account is *automatically* limited to only research alternative studies after a specific number of unexcused no-shows are accrued. The system will also reverse this limitation if an unexcused no-show is later reversed. To make this limitation handled automatically by the system, ensure that the Limited to Research Alternative Studies setting for a participant is set to Automatic (this is the default). If the No-Show Account Limit is reached for a participant, then this will not cancel any pending sign-ups they have for studies in the future, but will limit all future sign-ups to only studies marked as a research alternative. If necessary, the administrator can cancel any pending sign-ups, and if Administrator No-Show Notification Email is set to a value less than or equal to the No-Show Account Limit value, then the administrator will receive an email notification that also lists if there are any pending sign-ups for the participant.

A final option is if instructors want to give some type of bonus credit for participants who do not accrue any unexcused no-shows. To facilitate this, there is an Unexcused No-Shows column on the Credit Completion report. Instructors may use this information at their discretion. There is no direct feature in the system to grant any type of bonus credit through the system for not accruing no-shows, and the reason is that the credit grant would get extremely complicated when participants are in multiple courses, and also if they accrue an unexcused no-show after the bonus is granted, or a no-show is later reversed.

There are methods of making participants aware of the no-show policies, by including text in emails when they receive an unexcused no-show or their account is automatically limited. See Updating System Text for further information.

It is often useful to clear out unexcused no-shows from participants before the start of a new term, so they may start with a clean slate. See End-of-Semester Maintenance for options to delete unexcused no-shows, or convert them to excused no-shows.

Security Considerations

Security is typically a balance where the need to for information to be secure is weighed against convenience for users. Security needs may also vary based on what data is being stored in the system, and what type of research is being done.

In general, data in the system is not considered at high-risk in terms of its attractiveness to being sought out or stolen. Most criminals are looking for data which can produce an easy financial gain (and where there exists a market to sell such data), and most often this is financial information like credit card numbers. Data stored in the system, like information about who signed up for which study, does not have much commercial value on the open market. Even research data, like data collected as part of an online survey study, is likely to have limited value to others. To date, we have seen no malicious attempts to hack into our software, and we have had no reported cases of data being compromised.

Regardless, confidentiality of data is always important to maintain trust and ensure that users receive the level of privacy they expect. For that reason, it is best to consult with your IT department or IRB to determine security needs. The following sections outline some areas of concern.

Password Storage

All passwords in the system are stored in the system using a hashed format, which is basically like a one-way encryption scheme. In technical terms, passwords are hashed using the industry-standard BCrypt format, with a salt that varies with each password/user. This method of handling and storing passwords is compliant with generally accepted principles for secure systems, and similar methods are employed by most major websites.

Because of this method, it is not possible for the administrator to view current passwords of users, because there is no way to decrypt it and display it. Likewise, it is impossible to send login information that contains a user's existing password (as opposed to a new password).

When the administrator wants to send login information for *existing* users, there are options to send just login information (username only), or also reset the password and send a new password in the email as well. If sending to a group of existing users where many may already know their password, often it is easier just to send the login information and those who do not remember their password can simply use the Forgot Password feature to reset their password.

You may also force all participants to change their password upon their first login. This is useful particularly if their accounts were set up through a batch import, and the passwords were generated using some scheme (perhaps a variant of their student number) or some other default password, in place of using the system-generated random password feature. To enable this feature, set Change Password Requirement and Change Password Feature to Yes in System Settings.

For purposes of logging in, passwords are case-sensitive and the passwords are stored in the database in case-sensitive format.

When users go to change their password, they are required to choose a password that is at least 8 characters long. The system does not enforce a password scheme (like requiring a combination of upper case letters, symbols, etc.) because users in more than 25 countries use our product, in many languages, and there is no consistency about which characters are available on their keyboards, and some languages do not have a concept of upper- and lower-case letters.

Account Lockouts

The system has protections against what is known as a "brute force" attack, which is where an automated program will try every possible password in rapid succession to log in as a certain user. The system will allow only 10 failed attempts to log in (per user), at which point the account will be locked out for up to 24 hours. This security applies both to logins on the usual website as well as the mobile app. An account that has been locked out for this reason can be reset by the administrator in User

Management | View and Edit Users. The other options to free an account lockout is to simply wait as the lockout never lasts for more than 24 hours, or to use the Forgot Password feature.

Security Audit

You may perform a security audit of the system at any time by going to Administrator | Help and Documentation | Security Diagnostics. That will show if the system is configured using recommended security settings, and also confirm if access to the system is over an encrypted network connection (SSL).

It will also list information about administrator accounts in the system, like any accounts with insecure passwords, and active administrator accounts which have not logged into the system in more than 1 year. Dormant administrator accounts should be deleted or disabled as a security precaution.

Data Transmission

In most system configurations, the information sent between the system and the user is encrypted using SSL encryption, which is the same technology used on most online shopping sites. To determine if your site is using encrypted transmission, go to the site and once there, look at your browser's address bar. If the address starts with "http://" then no encryption is in place. If the address starts with "https://" (note the "s") then encryption *is* in place. On some browsers, a padlock symbol (usually green) will show to indicate an encrypted connection.

System Limits

Data Limits

The system does not have any hard limits concerning data storage, but the system performs better when there is less data in the system. When there is too much data in the system, actions like updating a study or downloading data may become slow or even fail to work at all.

Listed in the following table are some recommended limits and suggestions for how to reduce these numbers.

Data and Suggested Limit	Method to Reduce Data Size
Researcher and PIs (300)	Use End-of-Semester Maintenance to delete users if they do not have any studies. Delete old studies first to increase the number of potential users that can be deleted.
Participants (10,000)	Use End-of-Semester Maintenance to delete participants who have not logged into the system in a number of years.
Studies (300)	Use Batch Study Deletion to delete studies which have not been run recently or

	whose researchers are no longer using the system.
Online Survey/Prescreen Responses (400,000 total)	For online survey responses, the responses can be downloaded and then deleted without affecting records of who participated.
Online Survey/Prescreen Questions (5,000)	This refers to the total number of questions (not responses) across all online surveys and the prescreen. The best option to handle this is to delete online survey studies which are no longer active.
Courses (40)	If a course is not running during the current term, it can be usually be deleted. It's easy to add in the course again later.

The biggest effect on performance is the amount of prescreen and online survey responses stored in the system. This can be monitored on the System Summary Report, and we recommend keeping the total across all surveys and the prescreen to under 400,000 responses. This limit can vary based on the types of responses collected, with the recommended limit being lower if many responses are for free-form text questions (as opposed to multiple-choice questions), as these responses typically contain more text and thus take up more space. See Viewing Survey Data Usage and Deleting Survey Data for more information.

After using the system for a few years, if study and participant information is retained, the data may get a bit unwieldy. On top of that, some data may not really be necessary to preserve after a few years, as the researchers or participants involved have long since graduated. End-of-Semester Maintenance provides many options for deleting information based on last login dates, which is a good way to clear out just old data. Batch Study Deletion is also a good way of reviewing older studies and deleting them selectively (see Batch Study Deletion for more information). Batch Study Deletion works best after End-of-Semester Maintenance has been completed, as that maintenance often results in changes that make more studies eligible for deletion.

Foreign Language Support

The participant interface is available in languages other than English. At the time of this writing, it is also available in French, Chinese (Simplified), Japanese, Korean, German and Portuguese. These interfaces are available only for participants. For other user types, the interface is only available in English. For example, if a researcher goes to the front page of the site and chooses French, then the system will switch the interface back to English once they log in.

This affects only the interface, which is system-generated text that appears on interface areas, like the text on buttons and the names on pages. User-supplied text, like study names and descriptions, are displayed as they were entered without translation.

If you would like to enable support for a language, please contact Technical Support and we can enable this for you. You should only enable a language if you think participants will not understand English. When a language is enabled, that means you may also need to translate some system-specific text, like the privacy policy, to meet your needs.

If a language other than English is enabled, the system can be configured to default to that language for first-time visitors to the site. Contact Technical Support to have this configured. For returning visitors, the system will remember the language they used on their previous login and switch to that automatically.

If you would like to use the system in a language not currently offered, please contact Technical Support and we can work with you on the translation process.

Updating System Text for Foreign Languages

If you enable a foreign language, then you should go to Tasks, then Mass Email and Announcements | Update System Text and review and update the system-supplied text as needed. Generally, the text there is in English but you can easily modify it to include any further information you need, in the other language also. See Updating System Text for more information.

Potential Issues

One issue we have seen is with downloading data in CSV format and opening it in Excel, when the data contains text in language that make use of glyph-based characters (Chinese, Japanese, etc.). This appears to be a problem in Excel, and the workaround is to save the CSV download as a text file (instead of opening it directly in Excel), and then starting up Excel and choosing to import the text file as a CSV-formatted file. To do this, go to (Data | Get External Data | From Text in Excel and choose the CSV file. On the import dialog, choose Unicode (UTF-8) for the File Origin option.

In general, when doing something not in English in the system, be sure to test it carefully and thoroughly to make sure it will work as expected. This goes especially for prescreen and online survey data, as it would be a shame to collect a lot of data and then find out it's not possible to see it.

Accessibility Information

In general, the system should be usable for all users without hindrance. The system works correctly with screen-reading devices, and all non-decorative images are properly labeled. In addition, for participants, all text entry fields are linked to their descriptive text with use of <label for> tags. The system is predominantly text-based, and uses the popular Bootstrap framework for page layout, along with the Bootstrap Accessibility module.

Because of the complexity of the interface that the administrator sees, there may be cases where non-decorative images are not properly labeled. This only affects the administrator, and not any other type

of user. If this is an issue, please contact Technical Support and we will be happy to work on dealing with any issues in a timely manner.

Regulatory Compliance

Introduction

This software complies with all major regulations governing human subject research and privacy of data stored online. The system complies with both HIPAA and Common Rule for customers in the United States, when configured as such. For customers in Canada, it complies with the Personal Information Protection and Electronic Documents Act as well as the Tri-Council Statement. For customers in the European Union or in countries that follow OECD rules, it complies with OECD privacy rules and the European Union Directive of Data Protection.

Data stored on servers located in the United States is stored in compliance with the EC Directive on Data Protection. Compliance is covered under the EU Safe Harbor framework, and certification of compliance can be verified through the US Department of Commerce.

If you are in the United States, you can configure the system with Common Rule compliance only, or HIPAA *and* Common Rule compliance. Your IRB can advise about compliance issues for the system. The only difference is in the content of the human subjects/privacy policy statement that is linked from the bottom of every page on the site, once a user is logged in. The HIPAA statement contains references (as required under HIPAA) to medical information, so if this can be off-putting to participants and HIPAA compliance is not required, then it may be better to choose the Common Rule option only.

In most cases, your organization must comply with all human subject and data privacy rules that apply in your country. You should consult with your IRB for more information. Even if you are not required to comply, compliance is still a good idea, as protecting sensitive data is always a good thing. Compliance in the context of this system is as simple as reading the remaining paragraphs of this section (that apply to your organization) and following the guidelines contained therein. The remaining compliance issues involving software, privacy and electronic data storage are for the most part handled automatically by the system. You should still consult with your IRB or organization to learn more about additional compliance rules you must follow outside of use of this software (the handling of research data collected on paper would be one example).

You should also give some thought to the Unique ID Code feature (see Participant Unique ID Codes). In many cases, your IRB may require you to enable this feature to properly protect a participant's privacy.

No-Show Penalties

In January 2010, the Office of Human Research Protections (OHRP), which is part of the U.S. Department of Health and Human Services (HHS), issued a determination letter regarding assessing penalties when a participant does not show up for a study. You may read more here: http://www.hhs.gov/ohrp/policy/correspond/OHRP20100108.html

You should consult with your IRB for advice, but generally this applies to research funded by the U.S. Government, and to universities with a Federal-Wide Assurance (FWA) in place (common at most research universities). Even if your university is located outside the U.S., the determination may still apply if researchers receive U.S. Government support for their research. In addition, it some regulatory bodies in other countries are following the lead of OHRP on this issue.

To ensure compliance with the determination, simply set No-Show Penalty Credits to No Penalty in System Settings.

In the determination letter, OHRP proposed some alternative to issuing penalties, like restricting study opportunities, and offering bonus credits for not accruing any no-shows. Both options are supported in the system. See No-Show Handling for more information.

Handling an Information Request

In many cases, a participant has a right to request a copy of all data stored about them by the system, and this request should be granted in a timely manner, free of charge.

If you receive such a request, first verify the identity of the requester. After this is done, go to User Management | View and Edit Users, and print a copy of their record. This will contain all their signup data and other login data. If your system has the online prescreening feature enabled and they have participated in the prescreen, you should also print a copy of their prescreen results (a link is included on their user information page). In addition, if they participated in any online survey studies within the system, you should print that data as well. After following these steps, you have most likely complied with the regulations.

Data Handling and Security Guidelines

As an Administrator, you have access to every study and you can see who has signed up for those studies, as well as online prescreen responses. Because of these privileges, you should follow these simple guidelines:

- Secure Your Account. Use a password that is difficult to guess. The most secure passwords contain a combination of letters and numbers, do not spell a real word, and are at least 8 characters long.
- Secure Your Work Area. If you are logged into the system and you leave your computer, you should logout of the system or use a password lock on your computer. Ask your network administrator for help with setting up a password lock.
- Handle Paper Documents Carefully. Any printouts from the system should be kept reasonably secure. Store them in desk drawer out of the public view. Documents you decide to discard should be shredded if possible.
- Secure Electronic Data Carefully. Data exported from the system (using the Data Export feature) should be securely stored. Ask your network administrator for assistance with properly securing this data.

Strict IRB Mode

The system can run in strict IRB mode, if configured as such in System Settings. In this mode, a study must have an IRB approval code and expiration date in order to be added. The system does not check the format of the IRB approval code (since those may vary widely), but merely that some text is provided. So if the study is one that does not require IRB approval, it's acceptable to enter any text in this area.

The system will prevent any timeslots from being added which are to take place after the IRB expiration date. In addition, the study will be deactivated (participants will not be able to see it) on the expiration date. Only the administrator may extend the expiration date or change the IRB approval code.

Human Subjects/Privacy Policy Acknowledgment

Researchers and Principal Investigators must acknowledge the Human Subjects and Privacy Policy (all on one page) once every 6 months, if the Researcher Human Subject Policy Acknowledgment setting is enabled (see System Settings).

Participants must also acknowledge the policy once every 6 months, if the Participant Human Subject Policy Acknowledgment setting is enabled (see System Settings).

When a user is shown the policy for acknowledgment, they will see standard, regulation-compliant wording that is included with the software. If you would like to modify this with your organization's own policy, you may do so (see Updating System Text).

The standard policy varies depending on the type of user that is viewing it, and is available for review at any time through a link labeled "Human Subjects Policy" at the bottom of every page (for users who are logged in).

If anonymous identification (see Participant Identification in System Settings) is enabled at the time the policy was generated, participants will also be notified that researchers know them only by this code.